



Standard Eurobarometer 78 Autumn 2012

PUBLIC OPINION IN THE EUROPEAN UNION

REPORT

Fieldwork: November 2012

This survey has been requested and co-ordinated by the European Commission,
Directorate-General for Communication.

http://ec.europa.eu/public_opinion/index_en.htm

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Standard Eurobarometer 78 / Autumn 2012 – TNS Opinion & Social

Standard Eurobarometer 78
Autumn 2012

Public opinion in the European Union

Survey conducted by TNS Opinion & Social at the request of the
European Commission
Directorate-General Communication

Survey coordinated by the European Commission,
Directorate-General Communication
"Research and Speechwriting" Unit

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INTRODUCTION

This Standard Eurobarometer survey was carried out between 3 and 18 November 2012 in 34 countries and territories¹: the 27 Member States of the European Union (EU), the six candidate countries (Croatia, the Former Yugoslav Republic of Macedonia, Turkey, Iceland, Montenegro and Serbia), and the Turkish Cypriot Community in the part of the country not controlled by the government of the Republic of Cyprus.

The previous Standard Eurobarometer survey (EB77) in spring 2012 had been characterised by the relative stability of most of the indicators concerning perceptions of the economic situation. It had also revealed a slight deterioration in the indicators measuring support for the European Union and its institutions; however, these evolutions should be analysed in the light of the significant declines recorded in the autumn 2011 Standard Eurobarometer (EB76).

Just after the launch of this autumn 2012 survey, the European Commission published its autumn 2012 economic forecasts²: these predicted low annual GDP growth of 0.4% for the EU in 2013, with growth of 0.1% in the euro area, followed by a modest recovery in 2014, with GDP growth of around 1.6% in the EU and 1.4% in the euro area.

Several major events for the EU and its institutions took place during the weeks and months leading up to the survey. Key measures were adopted to promote a more integrated European Union: the European Stability Mechanism (ESM) was introduced on 27 September, while the Treaty on Stability, Coordination and Governance in the Economic and Monetary Union, signed on 2 March 2012, was due to enter into force on 1 January 2013. Another important event was the award of the 2012 Nobel Peace Prize to the European Union on 12 October.

National elections were held in Lithuania and the Netherlands. During the survey, the first round of the Presidential elections was held in Slovenia.

Outside Europe, Barack Obama was elected for a second term as President of the United States on 6 November.

The full report of the Eurobarometer survey consists of several volumes. This first volume presents the state of public opinion in the European Union. Four further volumes analyse the opinions of Europeans on other themes: the Europe 2020 strategy; the financial and economic crisis; European citizenship; and media habits in the European Union. This volume covers public opinion in the European Union.

¹ Please consult the technical specifications for the exact dates of the fieldwork in each country.

² http://ec.europa.eu/economy_finance/eu/forecasts/2012_autumn_forecast_en.htm

This volume devoted to the state of public opinion in the European Union is divided into three parts. In the first part, we examine personal, social, economic and political aspects of life in the European Union as perceived by its citizens. We examine the financial and personal situation of citizens; their views on the economic situation at national, European and global levels; their main concerns; and their expectations for the future. This part of the report also explores their interest in politics and their views on the direction in which things are going in their country and in the European Union, and analyses the extent to which citizens trust their national institutions and the UN.

The second part of the report presents the main indicators measuring the image of the European Union and its institutions and their respective trust ratings. First, it examines the extent to which Europeans feel attached to the European Union. It then analyses their views on the way democracy works and the extent to which their personal and national interests are taken into account by the European Union. This part of the report also explores the attitudes of Europeans to globalisation. The report then considers the extent to which Europeans are familiar with the European institutions and how far they trust them, before turning to their knowledge of the EU.

The third part of the report begins by analysing how far Europeans support various European policies, before examining their views on the main objectives of European integration, not only as they perceive them, but also as they would wish them to be. Finally, we consider opinions about the European Union's future.

The general analysis and the socio-demographic analyses are based on the results at the level of the average of the 27 Member States. This average is weighted so that it reflects the population of each Member State. The averages for previous years represent the results obtained in all the Member States of the European Union, as it was composed at the time the survey was conducted.

32 731 people from different social and demographic groups were interviewed face-to-face in their homes at the request of the European Commission. The methodology used is that of the Standard Eurobarometer surveys of the Directorate-General Communication ("Research and Speechwriting" Unit)³. A technical note on the interviewing methods of the institutes of the TNS Opinion & Social network is attached to this report. This note also specifies the confidence intervals⁴.

³ http://ec.europa.eu/public_opinion/index_en.htm

⁴ The results tables are annexed. It should be noted that the total of the percentages indicated in the tables in this report may exceed 100% when the respondent was able to choose several answers to the same question.

The abbreviations used in this report correspond to:

ABBREVIATIONS			
BE	Belgium	LV	Latvia
CZ	Czech Republic	LU	Luxembourg
BG	Bulgaria	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
IE	Ireland	SI	Slovenia
IT	Italy	SK	Slovakia
CY	Republic of Cyprus***	FI	Finland
LT	Lithuania	SE	Sweden
		UK	United Kingdom
CY(tcc)	Turkish Cypriot Community		
HR	Croatia	EU27	European Union – weighted average for the 27 Member States
TR	Turkey		
MK	Former Yugoslav Republic of Macedonia ****	EU15	BE, IT, FR, DE, LU, NL, DK, UK, IE, PT, ES, EL, AT, SE, FI*
IS	Iceland	NMS12	BG, CZ, EE, CY, LT, LV, MT, HU, PL, RO, SI, SK**
ME	Montenegro	Euro area	BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK
RS	Serbia	Non-euro area	BG, CZ, DK, LV, LT, HU, PL, RO, SE, UK

* EU15 refers to the 15 European Union Member States before the enlargements of 2004 and 2007

** The NMS12 countries are the 12 “new Member States” that joined the European Union at the time of the 2004 and 2007 enlargements

*** Cyprus as a whole is one of the 27 European Union Member States. However, the “acquis communautaire” has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the “CY” category and in the EU27 average. The interviews carried out in the part of the country that is not controlled by the government of the Republic of Cyprus are included in the “CY(tcc)” (tcc: *Turkish Cypriot Community*) category

**** Provisional abbreviation which in no way prejudices the definitive name of this country, which will be agreed once the current negotiations at the United Nations have been completed

* * * * *

*We wish to thank all the people interviewed throughout Europe
who took the time to participate in this survey.*

Without their active participation, this survey would not have been possible.

I. LIFE IN THE EUROPEAN UNION

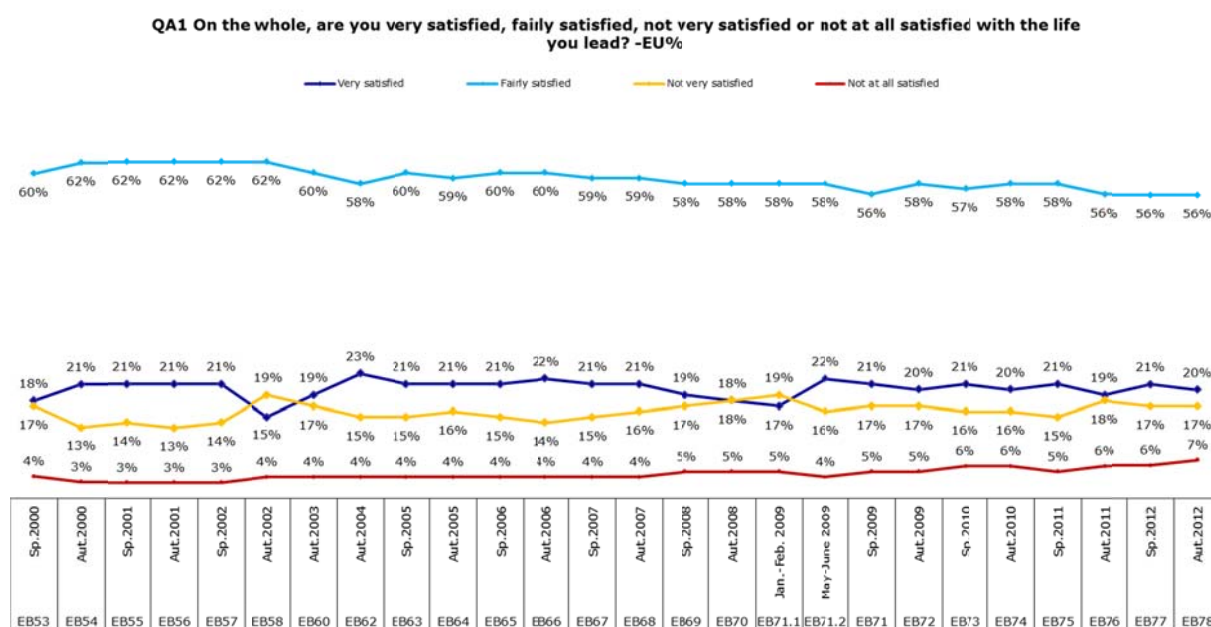
The views of Europeans on social and economic issues seem to have stabilised at lower levels, failing to return to the positions measured before the sharp deterioration recorded in the Standard Eurobarometer survey of autumn 2011 (EB76). In some areas opinions have hardened further, in particular as regards employment, which is a major cause of concern for Europeans. Although there are still significant differences between Member States, this Standard Eurobarometer carried out in autumn 2012 (EB78) reveals a deterioration in several economic indicators in countries which had previously seemed relatively unaffected

1. PERSONAL ASPECTS

1.1. The current personal situation of Europeans

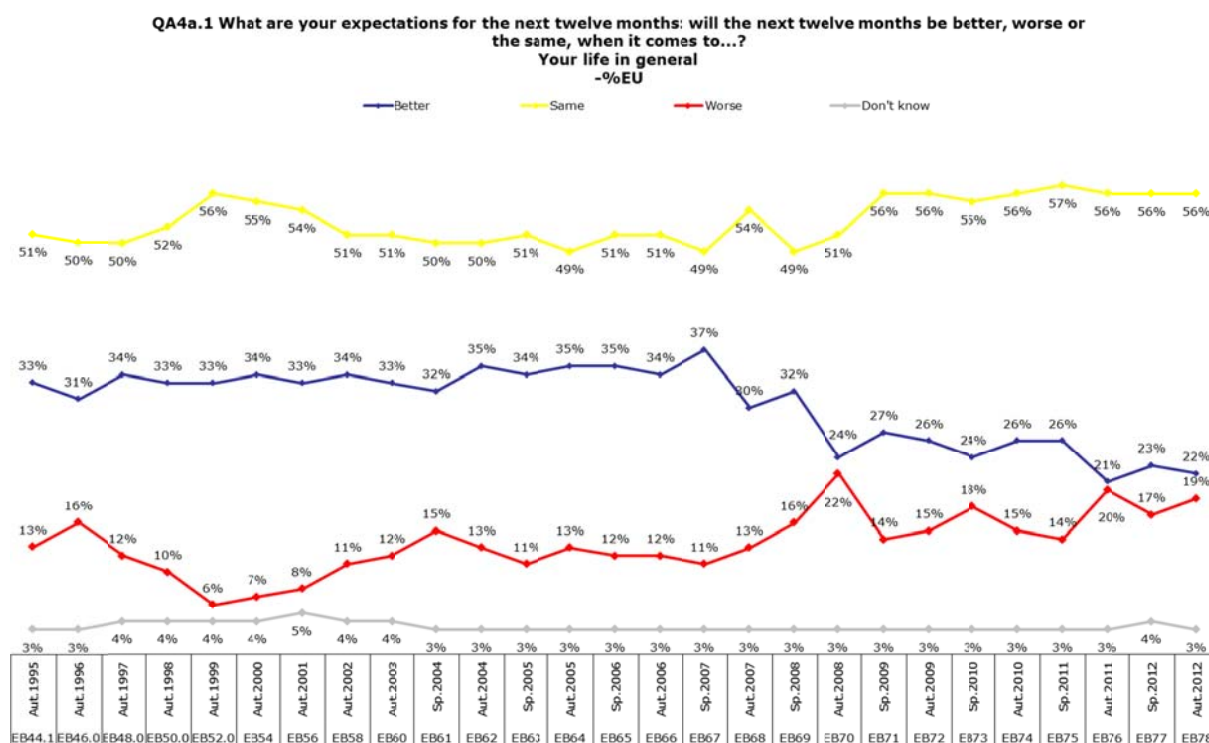
– An absolute majority of Europeans are satisfied with their lives; almost a quarter are dissatisfied –

The personal satisfaction of Europeans with the lives they lead remains high: despite a decrease of one percentage point since the spring 2012 Standard Eurobarometer survey (EB77), more than three-quarters of them are satisfied (76%), a majority of whom are still “fairly satisfied” (56%, =). The proportion of Europeans who are dissatisfied has gained one percentage point (24%, +1)⁵.



⁵ QA1 On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?

However, when asked about their expectations for the next twelve months, Europeans are slightly more pessimistic than in the spring 2012 Standard Eurobarometer survey (EB77), when expectations had improved slightly after the fairly sharp deterioration noted in the autumn 2011 survey (EB76). In this latest Standard Eurobarometer survey, conducted in autumn 2012, an unchanged majority of Europeans continue to believe that their life in general will not change over the next twelve months (56%, =), but the proportion who think that it will be “worse” has gained two percentage points (19%, +2). However, pessimism continues to be outweighed by optimism (22%, -1)⁶.



In 22 Member States, a majority of respondents are positive about their current personal situation, in many cases a fairly large majority. The exceptions, as in spring 2012, are Greece (68% dissatisfied), Portugal (68%), Bulgaria (59%), Romania (55%) and Hungary (52%).

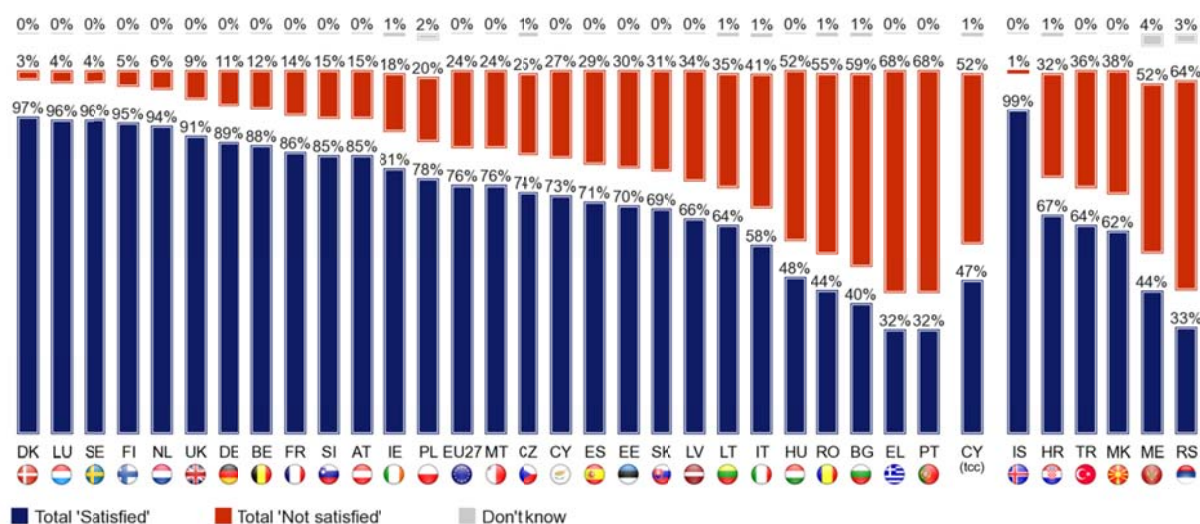
More than 90% of respondents are positive in six Member States: the United Kingdom (91%), the Netherlands (94%), Finland (95%), Sweden (96%), Luxembourg (96%) and Denmark (97%).

⁶ QA4 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

In the candidate countries:

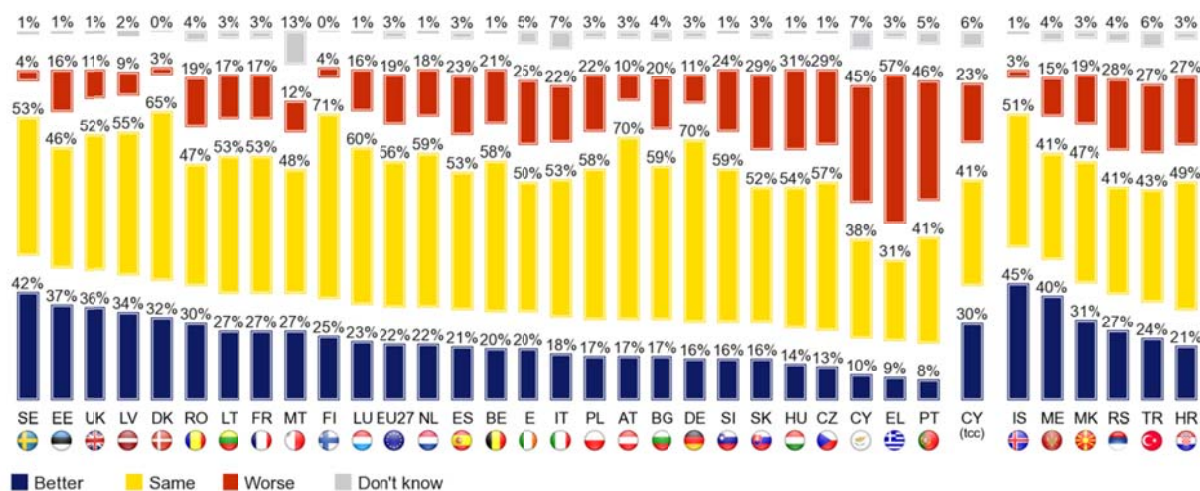
- Respondents in Iceland are almost unanimously optimistic in terms of personal satisfaction (99%) and this view is shared by large majorities in Croatia (67%), Turkey (64%) and the Former Yugoslav Republic of Macedonia (62%).
- However a majority of respondents are dissatisfied in Montenegro (52% dissatisfied) and Serbia (64%).

QA1. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?



QA4a.1. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...

Your life in general



Personal satisfaction has increased in Hungary (48%, +6 percentage points) though this is still the minority position. In contrast, it has declined in Cyprus (73%, -7), Ireland (81%, -5) and the Czech Republic (74%, -5), though it remains the majority position in these countries.

QA4a.1 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?
Your life in general

		Better- Worse EB77 Sp.2012	Better- Worse EB78 Aut.2012	Diff Aut2012- Sp.2012
	EU27	+6	+3	-3
	MT	+9	+15	+6
	UK	+19	+25	+6
	HU	-22	-17	+5
	ES	-5	-2	+3
	BG	-5	-3	+2
	IT	-6	-4	+2
	DK	+28	+29	+1
	LT	+10	+10	=
	AT	+7	+7	=
	LV	+26	+25	-1
	CZ	-14	-16	-2
	EE	+24	+21	-3
	EL	-45	-48	-3
	PL	-2	-5	-3
	SI	-4	-8	-4
	SE	+42	+38	-4
	NL	+9	+4	-5
	RO	+16	+11	-5
	DE	+11	+5	-6
	FI	+27	+21	-6
	BE	+7	-1	-8
	LU	+16	+7	-9
	IE	+7	-5	-12
	PT	-23	-38	-15
	SK	+3	-13	-16
	FR	+27	+10	-17
	CY	-4	-35	-31
	CY (tcc)	+6	+7	+1
	HR	+5	-6	-11
	TR	+9	-3	-12
	MK	+14	+12	-2
	IS	+42	+42	=
	ME	+35	+25	-10
	RS	=	-1	-1

Looking ahead over the next twelve months, the optimism index is now negative in 13 Member States, compared with 10 in the spring 2012 survey: Bulgaria, the Czech Republic, Greece, Spain, Italy, Cyprus, Hungary, Poland, Portugal and Slovenia, which have now been joined by Belgium, Ireland and Slovakia. By comparison, only five Member States had a negative index in the spring 2011 Standard Eurobarometer survey (EB75).

Respondents in Greece (where the index stands at -48) and Portugal (-38) are the most pessimistic.

1.2. Evaluation of the professional and financial situation

– The expectations of Europeans have deteriorated slightly as regards the financial situation of their household, while expectations for the job situation have stabilised –

The household financial situation

More than six out of ten Europeans say that the financial situation of their household is “good” (63%, versus 35% for whom it is “bad”)⁷. This view has gained one percentage point since the spring 2012 Standard Eurobarometer survey (EB77), though it has not returned to the level recorded in Standard Eurobarometer EB75 of spring 2011 (65%).

Prospects for the household economic situation over the coming twelve months, which had improved in spring 2012, have worsened a little: a majority of respondents continue to believe that the situation will stay the same (56%), but this majority has decreased (-2) while the proportion who think that the next twelve months will be “worse” has increased slightly (23%, +2). The proportion of optimists is unchanged (18%) and pessimists still outnumber optimists⁸.

A country-by-country analysis shows that:

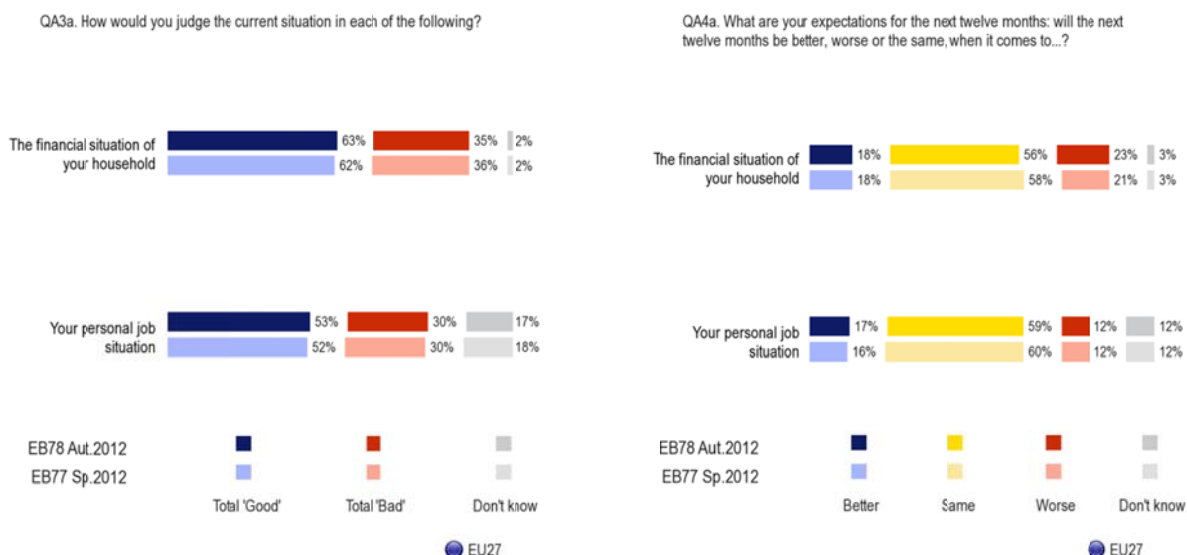
- A majority of respondents in 20 Member States (versus 19 in spring 2012) are positive about their household financial situation. The exceptions are Greece (77% describe it as “bad”), Hungary (70%), Portugal (67%), Bulgaria (66%), Romania (58%) and Italy (50%). A narrow majority of respondents in Ireland (51%, +4) are now positive, while in Cyprus opinion is evenly divided (50%, +2, versus 50%, -1). There have been no significant changes on this indicator.
- The optimism index is now negative in 16 Member States (compared with 14 in spring 2012). However, there are sharp falls in Cyprus (-28 to -49), Portugal (-21 to -53), Slovakia (-14 to -20), Belgium (-14 to -9) and France (-13, though the index remains just positive, +3).
- Exceptionally, the optimism index for the household financial situation is positive and has increased in Lithuania (+2 to 9) and the United Kingdom (+3 to 11).

In the candidate countries, a majority of respondents in Iceland and the Former Yugoslav Republic of Macedonia continue to be positive about both their current household financial situation and the future outlook.

⁷ QA3a How would you judge the current situation in each of the following?

⁸ QA4a What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

Opinions are now predominantly negative in Turkey (43% are satisfied, representing an 8-point decline, while the optimism index has fallen by 14 percentage points to -8). Dissatisfaction is still dominant in Croatia (53%), Montenegro (61%) and Serbia (69%). Montenegro continues to stand out by its positive optimism index, despite a fall of 10 percentage points (+18).



The job situation

Just over half of Europeans are satisfied with their job situation, a result which is more or less unchanged since the spring 2012 Standard Eurobarometer survey (53%, +1 percentage point, while 30% are dissatisfied, unchanged), though satisfaction levels have now risen by two percentage points since the autumn 2011 Standard Eurobarometer survey (EB76).

Views on the job outlook over the next twelve months are also more or less unchanged: a majority of respondents continue to believe that the next twelve months will stay the same (59%, -1), while the proportion who think that they will be “better” has gained one percentage point (17%) and remains higher than the proportion of Europeans who believe that they will be “worse” (12%, =).

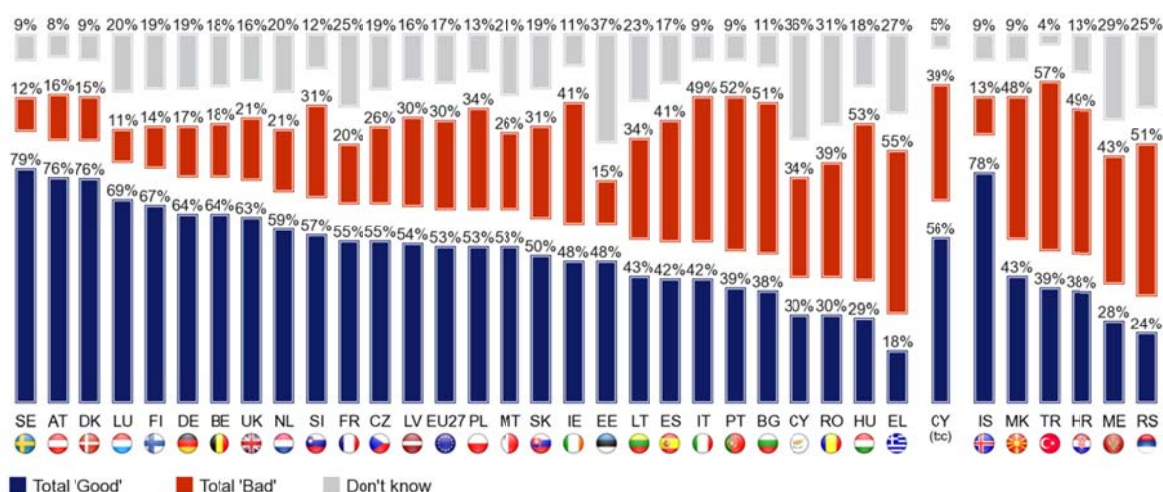
Points of note:

- As was the case in spring 2012, a majority of respondents in 20 Member States are satisfied with their job situation. The exceptions are Bulgaria, Greece, Italy, Hungary, Portugal and Romania, which have now been joined by Cyprus. After a slight increase, respondents in Spain are once again predominantly satisfied, albeit by a narrow majority.

- The optimism index is positive in 16 Member States, but, as for expectations regarding the household financial situation, it has fallen sharply in some countries: Cyprus (-23 to -30), Portugal (-9 to -30), Slovakia (-8 to -7), as well as in Belgium (-8 to +3) and France (-8 to +15), where it nevertheless remains positive.
- Exceptionally, the optimism index as regards the job situation has improved significantly in Lithuania (+9 to 7) and the United Kingdom (+7 to 21).
- Of the candidate countries, Iceland is the only one where a majority of respondents are positive about their job situation (78%). The optimism index for the job outlook is positive in Iceland (+21), Montenegro (+13) and the Former Yugoslav Republic of Macedonia (+3). It is negative in Croatia (-3) and Serbia (-9). Finally, the index is now negative in Turkey (-7), after a decline of seven percentage points.

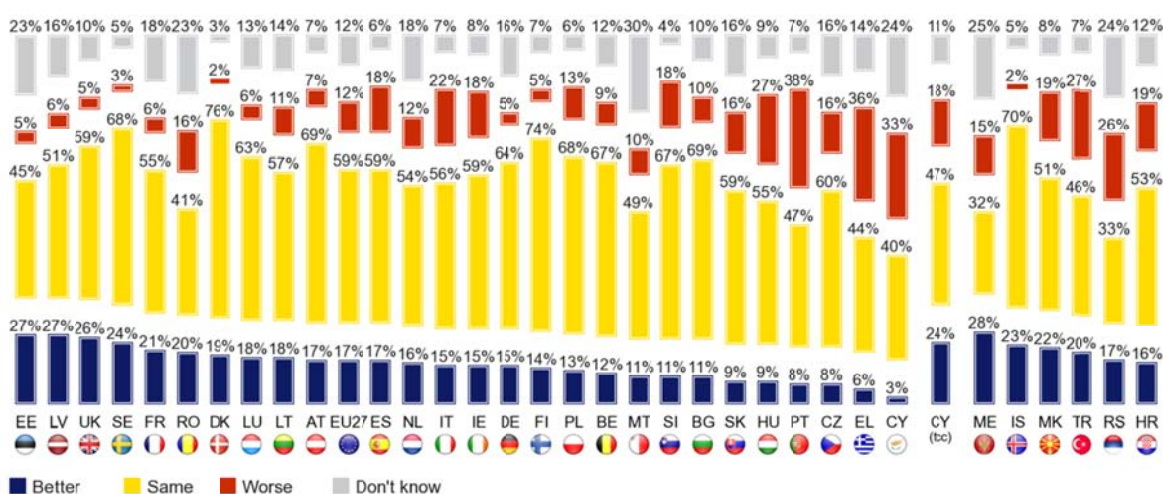
QA3a.4. How would you judge the current situation in each of the following?

Your personal job situation



QA4a.5. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

Your personal job situation



There are significant socio-demographic divisions on all these indicators. For example, the most advantaged respondents and those who almost never have difficulties paying their bills are more likely than average to be satisfied.

Managers are also more satisfied than white-collar workers, who in turn are more satisfied than manual workers.

The same trends are perceptible as regards short-term expectations, though the differences are narrower. The factor which appears to have most influence on these satisfaction indicators is the difficulty respondents have in paying their bills: Europeans who often struggle to pay their bills are far less likely than average to be satisfied and far more likely than average to be pessimistic in their projections for the future.

	QA3a How would you judge the current situation in each of the following?						QA4a What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?							
	Your personal job situation			The financial situation of your household			The financial situation of your household				Your personal job situation			
	Total 'Good'	Total 'Bad'	Don't know	Total 'Good'	Total 'Bad'	Don't know	Better	Same	Worse	Don't know	Better	Same	Worse	Don't know
EU27	53%	30%	17%	63%	35%	2%	18%	56%	23%	3%	17%	59%	12%	12%
 Gender														
Men	56%	29%	15%	65%	33%	2%	18%	58%	22%	2%	18%	60%	12%	10%
Women	49%	31%	20%	60%	38%	2%	17%	56%	24%	3%	16%	59%	12%	13%
 Age														
15-24	50%	28%	22%	67%	29%	4%	28%	54%	14%	4%	30%	47%	10%	13%
25-39	59%	37%	4%	60%	38%	2%	26%	50%	21%	3%	26%	56%	13%	5%
40-54	60%	35%	5%	60%	39%	1%	17%	55%	26%	2%	17%	62%	16%	5%
55 +	44%	22%	34%	64%	34%	2%	8%	63%	27%	2%	5%	64%	10%	21%
 Education (End of)														
15-	34%	36%	30%	50%	48%	2%	9%	57%	31%	3%	7%	59%	16%	18%
16-19	53%	33%	14%	60%	39%	1%	17%	56%	24%	3%	17%	59%	13%	11%
20+	66%	24%	10%	75%	24%	1%	21%	58%	20%	1%	21%	62%	10%	7%
Still studying	48%	20%	32%	70%	25%	5%	25%	57%	13%	5%	27%	49%	7%	17%
 Socio-professional category														
Self-employed	68%	31%	1%	66%	33%	1%	22%	52%	23%	3%	23%	58%	15%	4%
Managers	87%	12%	1%	84%	15%	1%	20%	63%	15%	2%	20%	68%	9%	3%
Other white collars	75%	23%	2%	71%	28%	1%	20%	55%	23%	2%	18%	65%	14%	3%
Manual workers	68%	30%	2%	63%	35%	2%	20%	56%	21%	3%	19%	63%	14%	4%
House persons	32%	38%	30%	50%	48%	2%	15%	54%	28%	3%	14%	59%	13%	14%
Unemployed	9%	85%	6%	26%	72%	2%	26%	38%	32%	4%	33%	35%	24%	8%
Retired	38%	19%	43%	64%	34%	2%	7%	64%	27%	2%	3%	63%	8%	26%
Students	48%	20%	32%	70%	25%	5%	25%	57%	13%	5%	27%	49%	7%	17%
 Difficulties paying bills														
Most of the time	22%	65%	13%	16%	82%	2%	19%	33%	44%	4%	20%	42%	28%	10%
From time to time	43%	43%	14%	43%	55%	2%	19%	48%	30%	3%	18%	56%	17%	9%
Almost never	64%	16%	20%	82%	16%	2%	17%	65%	16%	2%	16%	64%	7%	13%

1.3. The concerns of Europeans

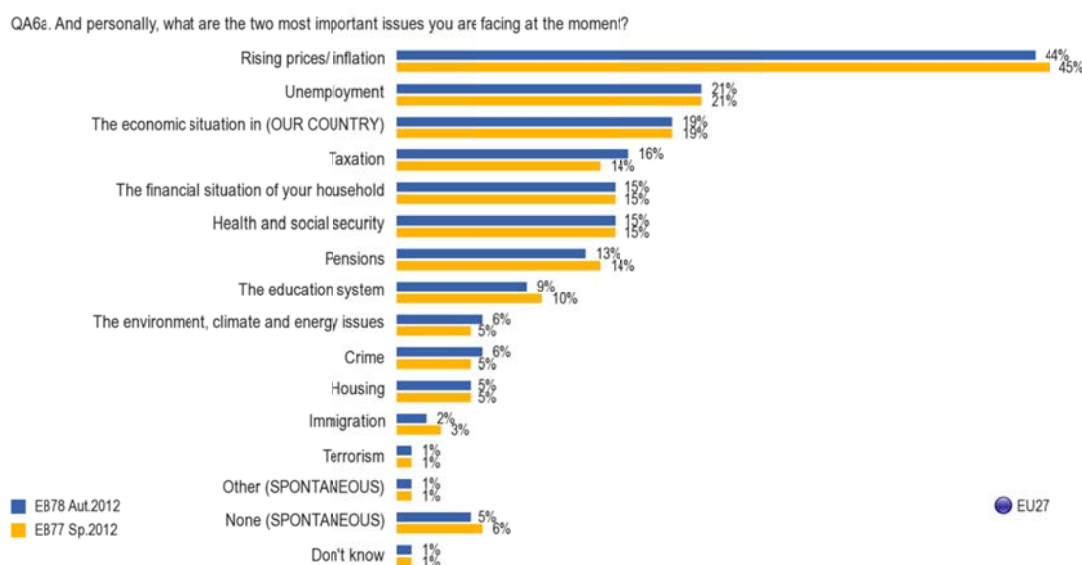
–Personal concerns are still dominated by economic issues, without major changes –

Rising prices are still by far the main personal concern of Europeans (44%, -1 percentage point), followed by **unemployment** (21%, =) and **their country's economic situation** (19%, =).

A subject which is of slightly more concern than in the spring 2012 Standard Eurobarometer survey is **taxation** (16%, +2), which has overtaken **the household financial situation** (15%, =), while being closely linked to it.

Health and social security (15%, =) and **pensions** (13%, -1) were also mentioned in proportions identical or similar to spring 2012, ahead of the **education system** (9%, -1).

Few respondents mentioned **crime** (6%, +1), **environmental, climate and energy issues** (6%, +1), **housing** (5%, =), **immigration** (2%, -1) or **terrorism** (1%, =)⁹.






































- **Rising prices** are the main concern in 21 Member States, led by Lithuania (66%), Slovakia (66%), Estonia (65%) and Hungary (64%). This issue has gained ground since spring 2012 in Bulgaria (56%, +5), Slovenia (36%, +6) and Greece (31%, +5).
- **Unemployment** continues to be the main concern in Spain, recording a 3-point rise (43%). This item is also mentioned more often than in spring 2012 in the Czech Republic (14%, +5).

⁹QA6 And personally, what are the two most important issues you are facing at the moment?

- **The country's economic situation** is the main personal concern of respondents in Greece (36%), but with a lower score than in spring 2012 (-4). The proportion of respondents mentioning this issue has fallen sharply in Cyprus (15%, -13), but this trend has been offset by a strong increase in the proportion of respondents mentioning the **financial situation of the household** (42%, +16), which is now the first concern.
- As in spring 2012, respondents in the **euro area** are more likely to be concerned about their country's economic situation than about the situation of their household (20% and 13% respectively), whereas the situation is the opposite outside the euro area (17% and 20% respectively).
- **Taxation** continues to be mentioned very frequently in Italy (39%, +2), as it now also is in Greece (30%, +14) and Lithuania (32%, +9) where this subject has gained significant ground. It has also gained ground since spring 2012 in France (17%, +6).
- **Health and social security** tops the list of concerns in Sweden (39%, =) and the Netherlands (32%, =), and is now also the first item mentioned in Finland where it has gained significant ground (39%, +9).
- Respondents in Sweden are also more likely than average to mention the **education system** (26%), and **environmental, climate and energy issues** (25%).

In the candidate countries, rising prices/inflation are the main personal concern in Croatia (59%), the Former Yugoslav Republic of Macedonia (49%), Serbia (48%), Montenegro (43%) and Iceland (42%). This issue is mentioned less often in Turkey (30%), where it has been overtaken by the country's economic situation (41%).

QA6a And personally, what are the two most important issues you are facing at the moment?

		Rising prices/ inflation	Unemploy- ment	The economic situation in (OUR COUNTRY)	Taxation	The financial situation of your household	Health and social security	Pensions	The education system	The environment, climate and energy issues	Crime	Housing	Immigration	Terrorism
	EU27	44%	21%	19%	16%	15%	15%	13%	9%	6%	6%	5%	2%	1%
	BE	46%	14%	16%	16%	11%	6%	11%	6%	9%	14%	5%	5%	1%
	BG	56%	25%	23%	6%	22%	20%	16%	6%	3%	5%	2%	1%	1%
	CZ	58%	14%	14%	12%	19%	17%	13%	6%	3%	2%	8%	1%	1%
	DK	26%	18%	20%	7%	12%	10%	13%	10%	11%	5%	6%	4%	0%
	DE	46%	11%	10%	12%	14%	17%	15%	14%	11%	3%	3%	2%	1%
	EE	65%	13%	15%	16%	16%	18%	16%	10%	3%	2%	5%	0%	0%
	IE	38%	33%	37%	16%	20%	13%	7%	8%	2%	9%	4%	3%	0%
	EL	31%	30%	36%	30%	23%	11%	14%	8%	0%	7%	0%	2%	0%
	ES	29%	43%	32%	14%	9%	11%	11%	10%	1%	2%	7%	2%	0%
	FR	51%	17%	15%	17%	13%	13%	13%	10%	6%	10%	8%	3%	1%
	IT	45%	25%	24%	39%	8%	7%	8%	5%	3%	3%	2%	3%	2%
	CY	35%	31%	15%	6%	42%	10%	9%	6%	2%	8%	3%	4%	0%
	LV	41%	22%	22%	17%	15%	21%	13%	9%	1%	1%	9%	3%	0%
	LT	66%	17%	12%	32%	9%	12%	9%	6%	3%	3%	6%	3%	0%
	LU	34%	13%	12%	13%	9%	6%	13%	15%	8%	7%	14%	6%	0%
	HU	64%	26%	19%	7%	25%	13%	15%	6%	3%	3%	7%	0%	0%
	MT	61%	7%	19%	10%	11%	8%	13%	10%	15%	4%	3%	7%	0%
	NL	27%	14%	27%	12%	20%	32%	15%	17%	7%	4%	7%	1%	1%
	AT	57%	10%	11%	12%	17%	17%	13%	11%	9%	7%	8%	3%	2%
	PL	53%	29%	14%	6%	17%	17%	14%	4%	1%	3%	3%	1%	1%
	PT	48%	26%	22%	17%	13%	9%	14%	2%	0%	1%	10%	0%	2%
	RO	52%	16%	25%	9%	24%	20%	17%	8%	3%	9%	4%	1%	1%
	SI	36%	17%	24%	8%	14%	12%	21%	11%	6%	2%	6%	1%	0%
	SK	66%	15%	16%	5%	21%	15%	12%	7%	5%	3%	9%	0%	0%
	FI	32%	15%	18%	10%	13%	39%	14%	6%	14%	4%	10%	3%	1%
	SE	4%	19%	18%	4%	19%	39%	18%	26%	25%	7%	10%	5%	0%
	UK	38%	17%	14%	10%	21%	13%	16%	11%	7%	11%	5%	6%	0%
	CY (tcc)	50%	23%	23%	12%	18%	12%	3%	10%	6%	14%	7%	4%	4%
	HR	59%	27%	25%	10%	28%	8%	17%	5%	2%	3%	6%	0%	0%
	TR	30%	27%	41%	5%	1%	4%	2%	8%	12%	3%	2%	1%	28%
	MK	49%	38%	21%	5%	22%	8%	6%	3%	4%	4%	3%	1%	1%
	IS	42%	8%	21%	22%	24%	18%	14%	16%	5%	1%	14%	1%	0%
	ME	43%	31%	28%	5%	21%	7%	4%	6%	2%	4%	5%	1%	1%
	RS	48%	29%	27%	6%	26%	8%	6%	5%	2%	9%	6%	1%	1%

Highest percentage per country

Lowest percentage per country

Highest percentage by item

Lowest percentage by item

A socio-demographic analysis shows that rising prices and inflation are the main concern in all categories, except among unemployed people who are chiefly worried about unemployment (77%, compared with 21% of Europeans as a whole).

Self-employed people are far more likely than average to be concerned about taxation (32%, versus 16% of Europeans as a whole).

Managers are far more likely than average to mention the education system (17%) whereas they are less likely to be concerned about unemployment (9%). They are also more concerned about their country's economic situation (21%) than about the financial situation of their household (16%), whereas these two concerns are ranked equally by unemployed people (20%).

This distinction is particularly noticeable between Europeans who almost never have difficulties paying their bills (17% mention their country and 10% their household) and those who have difficulties most of the time (22% and 30%).

The youngest respondents are more likely than average to mention unemployment (28%), which ranks in second place among their concerns, after rising prices (37%) and just ahead of the education system (26%).

QA6a And personally, what are the two most important issues you are facing at the moment?

	Rising prices\inflation	Unemployment	The economic situation in (OUR COUNTRY)	Taxation	The financial situation of your household	Health and social security
EU27	44%	21%	19%	16%	15%	15%
Gender						
Men	41%	22%	21%	18%	15%	13%
Women	46%	20%	17%	14%	16%	16%
Age						
15-24	37%	28%	17%	10%	12%	8%
25-39	46%	27%	21%	19%	18%	11%
40-54	45%	25%	21%	18%	20%	12%
55 +	44%	12%	16%	14%	11%	22%
Education (End of)						
15-	46%	22%	17%	17%	14%	15%
16-19	48%	21%	19%	16%	18%	15%
20+	40%	19%	20%	17%	14%	16%
Still studying	34%	23%	17%	8%	10%	9%
Socio-professional category						
Self-employed	38%	14%	29%	32%	15%	10%
Managers	43%	9%	21%	20%	16%	13%
Other white collars	49%	15%	23%	21%	17%	12%
Manual workers	51%	17%	18%	18%	19%	13%
House persons	49%	24%	18%	15%	17%	13%
Unemployed	32%	77%	20%	7%	20%	7%
Retired	45%	9%	13%	12%	11%	25%
Students	34%	23%	17%	8%	10%	9%
Difficulties paying bills						
Most of the time	40%	42%	22%	13%	30%	9%
From time to time	49%	27%	21%	18%	20%	11%
Almost never	42%	14%	17%	15%	10%	18%

6 most frequently mentioned items

2. ECONOMIC ASPECTS

– Opinions of the economic situation remain negative, while perceptions of employment have deteriorated –

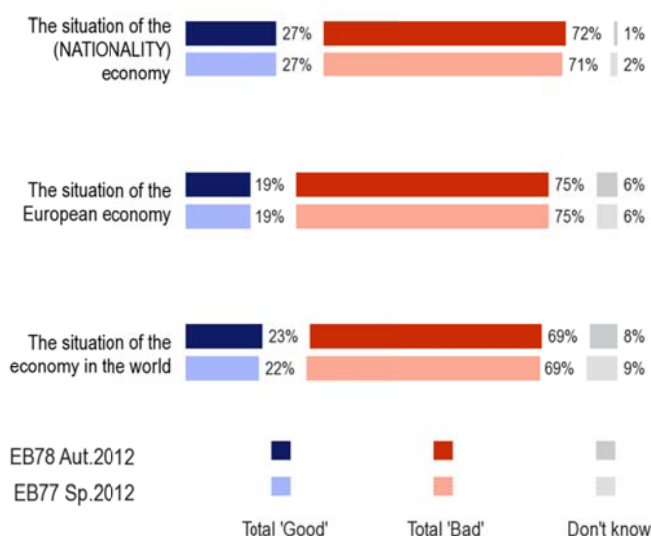
2.1. Evaluation of the current economic situation

2.1.1. The national, European and world situations

Europeans remain negative about their country's economic situation:

more than seven out of ten describe it as "bad" (72%, +1 percentage point, compared with 27% who say it is "good", =). Almost three in ten Europeans go so far as to say that it is "very bad" (29%, -1). These results are quite close to those recorded at the time of the autumn 2011 Standard Eurobarometer survey (EB76), which saw a sharp deterioration (31% of Europeans then considered that their country's situation was "very bad", a 6-point rise since spring 2011 (EB75)).

QA3a. How would you judge the current situation in each of the following?



Opinions of the European economic situation also remain largely

negative: three-quarters of Europeans say it is "bad" (75%, compared with only 19% who say it is "good"). These proportions are unchanged since the spring 2012 Standard Eurobarometer survey (EB77). However, the proportion of respondents saying that the European economic situation is "very bad" has fallen by three percentage points (to 22%, compared with 53% for "rather bad", +3). These very negative opinions stood as high as 27% in autumn 2011.

Opinions of the world economy are also unchanged and largely negative, though Europeans are slightly less gloomy than they are about the situation in their country or in the European Union: 69% of Europeans (unchanged) say that the global economic situation is "bad" and just under a quarter think that it is "good" (23%, +1)¹⁰.

Euro area respondents continue to assess their country's economic situation a little more favourably than respondents outside the euro area (28%, -1, versus 24%, +1), but the gap has narrowed significantly (the results stood at 34% within the euro area and 24% outside it in spring 2011). Only 16% (-1) of euro area respondents say that European economic situation is good, whereas those in the other Member States are slightly more positive (24%, +1, a 4-point rise since autumn 2011). This gap is wider still as regards the global economic situation: 19% of respondents in the euro area believe

¹⁰ QA3. How would you judge the current situation in each of the following?

that it is “good” (=), compared with 28% outside it (+1). Euro area respondents are therefore more positive about the economic situation in their country than about the world economy (28% versus 19%), whereas the opposite is true outside the euro area (24% versus 28%). A comparison between the EU15 countries and the NMS12 countries reveals a similar phenomenon: perceptions of the national economic situation are more positive in the EU15 countries (29%) than in the NMS12 countries (18%); the opposite applies to perceptions of the European economic situation (15% versus 33%) and the world economy (20% versus 33%).

QA3a.1 How would you judge the current situation in each of the following?

	The situation of the (NATIONALITY) economy		The situation of the European economy		The situation of the economy in the world	
	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'
 EU27	27%	72%	19%	75%	23%	69%
Euro area	28%	71%	16%	80%	19%	74%
Non-euro area	24%	74%	24%	66%	28%	61%
EU15	29%	70%	15%	80%	20%	73%
NMS12	18%	80%	33%	57%	33%	53%

The national economic situation

- As in spring 2012, only six Member States are predominantly positive about the national economic situation: Germany (75%), Sweden (75%), Luxembourg (70%), Austria (65%), Finland (55%) and Denmark (53%).
- However, even among these exceptions, there have been some significant declines in positive opinions since spring 2012: -12 percentage points in Luxembourg and -13 in Finland.
- Other significant declines mirror the evolutions recorded for personal satisfaction, notably in Belgium where satisfaction has lost 17 percentage points (falling to 20%) following a 24-point decline in 2011, but also in Cyprus (only 6% are satisfied, -8, after -12 in the autumn 2011 survey).
- Negative opinions remain as high as 90% or more in nine Member States (Greece, Spain, Cyprus, Italy, Slovenia, Romania, Bulgaria, Ireland and Hungary).
- **Note:** although a very large majority of respondents say their economy is “bad” in Portugal, this proportion has nevertheless shrunk by eight percentage points (to 89%, versus 11% “good”).

The European economic situation

- The belief that the European economic situation is “bad” is dominant in all Member States, except, as in spring 2012, in Lithuania (47% think that it is “good”, -1, versus 43% for “bad”, +1), and now in Bulgaria, where perceptions have improved (43%, +5 versus 41%, -7).
- Although still overwhelmingly negative, somewhat fewer respondents now say the situation of the economy in the European Union is “bad” in Spain (83%, -7) and Ireland (85%, -7). In Ireland, it is the most emphatic position that has lost ground: 34% say that the situation is “very bad” (-20) while an absolute majority of respondents describe it as “rather bad” (51%, +13).
- In the United Kingdom too, fewer respondents are now negative, though this is still clearly the majority view (80%, -5). The proportion who see the situation as “very bad” has fallen most steeply (40%, -10).
- The gloomiest assessments come in Italy (89% of respondents say that the EU’s economic situation is “bad”), Portugal (88%) and Sweden (87%). These countries have now been joined by Belgium, where opinions have hardened sharply (86%, +12, including 27% for “very bad”, +13).
- In Finland, where respondents are more negative than in spring 2012 about the national economic situation, they are also now more likely to describe the European economy as “bad” (77%, +8).

The world economic situation

- The same trends are found as for the situation of the economy in the European Union.
- There are only two countries in which a majority of respondents are not negative about the global economic situation: Lithuania, where opinions are evenly divided, despite a fall in “good” answers (43%, -3), and Bulgaria, where positive opinions have gained ground (42%, +6, versus 37%, -5).
- Positive opinions have lost most ground in Belgium (16%, -8) and Finland (32%, -7), but have gained a number of percentage points in Ireland (13%, +6) and Spain (13%, +6).

In the candidate countries:

- An increasing majority of respondents are negative about the national economic situation in Turkey (58%, +6), following a significant decline in spring 2012 (-10 at that time).
- A majority of respondents are also pessimistic about the European economy, except in the Former Yugoslav Republic of Macedonia (54% think that the situation is “good”, unchanged, versus 36%, -3).

A socio-demographic analysis reveals divisions which are more or less marked depending on whether the national or the European economic situation is concerned:

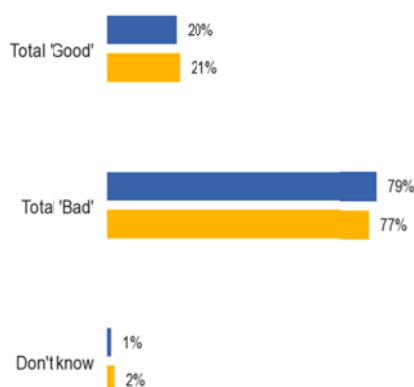
- Although the respondent's age has little influence on opinions of the **national economic situation**, education has more impact: Europeans who studied up to the age of 20 or beyond are more positive (33%) than those who left school before the age of 16 (20%). Opinions also vary according to the respondent's occupation: managers (40%) are more positive than white-collar workers (27%), manual workers (24%), retired people (27%) and the unemployed (15%). Europeans who almost never have difficulties paying their bills (36%) are also far more likely to describe the situation as "good" than those who have such difficulties most of the time (9%). Finally, Europeans who are very interested in politics are more positive (33%) than those who are not at all interested (14%).
- The differences are not identical when it comes to assessments of the **European economic situation**. Here, age plays a greater role in shaping opinions, since 15-24 year-olds are more positive (26%) than older respondents (15% of those aged 55 or over). But the respondent's occupation creates fewer differences (21% of managers, versus 19% for white-collar and manual workers), as does the extent of the respondent's interest in politics (19% among those who are very interested, versus 14% of those who are not at all interested).

2.1.2. *The employment situation*

Europeans are now slightly more critical of the national employment situation: 79% say that it is "bad" (+2 percentage points, versus 20% "good", -1), including 38% who describe it a "very bad" (+1).

QA3a.6. How would you judge the current situation in each of the following?

The employment situation in (OUR COUNTRY)



■ EB76 Aut.2012
■ EB77 Sp.2012

● EU27

Only three Member States are now predominantly positive about the national employment situation: Germany (59%), Austria (59%) and Luxembourg (53%).

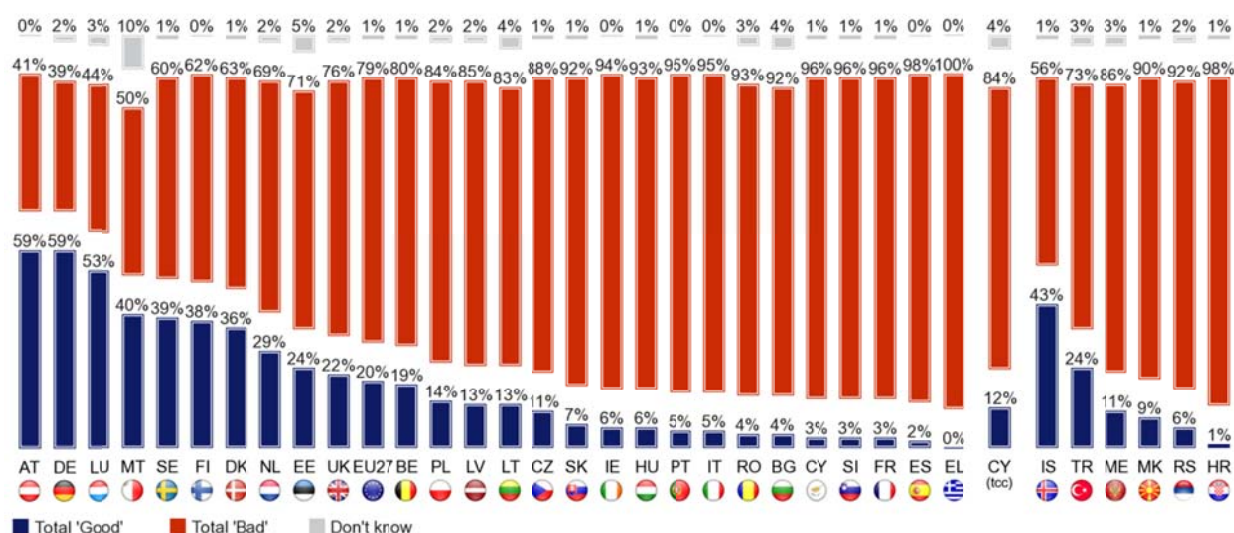
Positive opinions have lost ground sharply in Finland (38%, -17) where a majority of respondents are now negative.

But the most spectacular deterioration is found in Belgium, where only 19% of respondents now describe the employment situation as “good”, a decline of -22 percentage points since the spring 2012 Eurobarometer survey (EB77) and -35 since autumn 2011 (EB76). Positive opinions have also fallen sharply in the Netherlands (29%, -15).

More than 90% of respondents are negative in 12 Member States (Greece, where they reach 100%, Spain, France, Cyprus, Slovenia, Italy, Portugal, Ireland, Hungary, Romania, Bulgaria and Slovakia).

QA3a.6. How would you judge the current situation in each of the following?

The employment situation in (OUR COUNTRY)



2.2. Expectations for the next twelve months

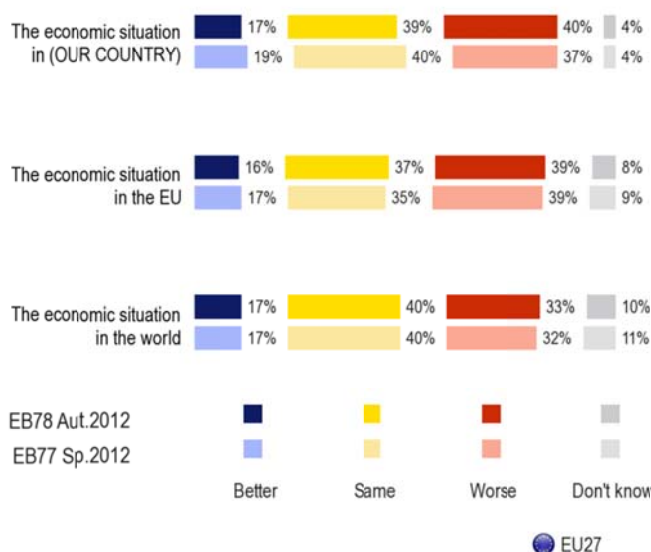
– Growing pessimism over the national outlook, especially as regards employment –

2.2.1. The national, European and world situations

Although their economic forecasts for the next twelve months are more or less unchanged in respect of the world and EU situations, Europeans are now more pessimistic about their country's economic outlook¹¹:

- The predominant view is that the next twelve months will be “worse” for **the national economy** (40%, +3 percentage points). An almost identical proportion of respondents believe that the situation will “stay the same” (39%, -1), while fewer now say that the next twelve months will be “better” (17%, -2).
- Respondents are also predominantly pessimistic about **the European economic situation**, (39%, unchanged), while a slightly smaller proportion think that the situation will stay the same (37%, +2). Optimism has declined (16% “better”, -1).
- **The world economic situation** is expected to stay the same (40%, unchanged), while 33% of respondents are pessimistic (+1), and 17% (=) think that the next twelve months will be “better”.

QA4a. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?



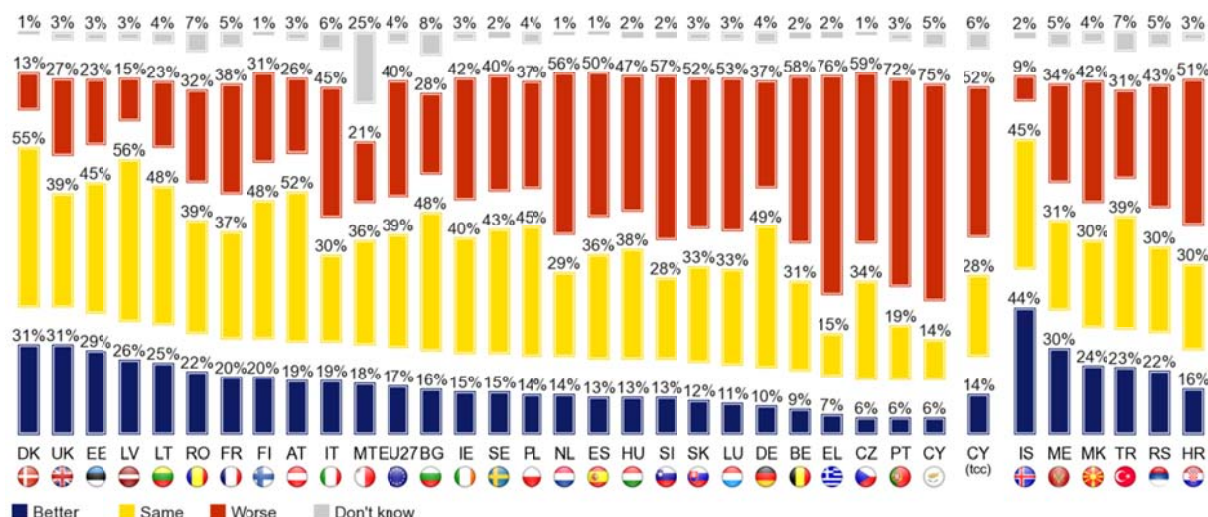
The forecasts for these questions differ from one group of countries to another. Euro area respondents are more pessimistic about the national economy (44%) than non-euro area respondents (33%). However, there are few differences between the EU15 countries (where 41% of respondents expect the next twelve months to be “worse”) and the NMS12 countries (39%).

¹¹ QA4 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same ...? The economic situation in (OUR COUNTRY)/The economic situation in the EU/The economic situation in the world

Euro area respondents are also more pessimistic about the economic situation in the European Union (43% think that the next twelve months will be “worse”, versus 32% of non-euro area respondents). Whereas there were few differences between the EU15 countries and the NMS12 countries on the subject of the national economic situation, the differences here are more striking: EU15 respondents are far more pessimistic about the European economic situation (42% answered “worse”, versus 26% in the NMS12 countries).

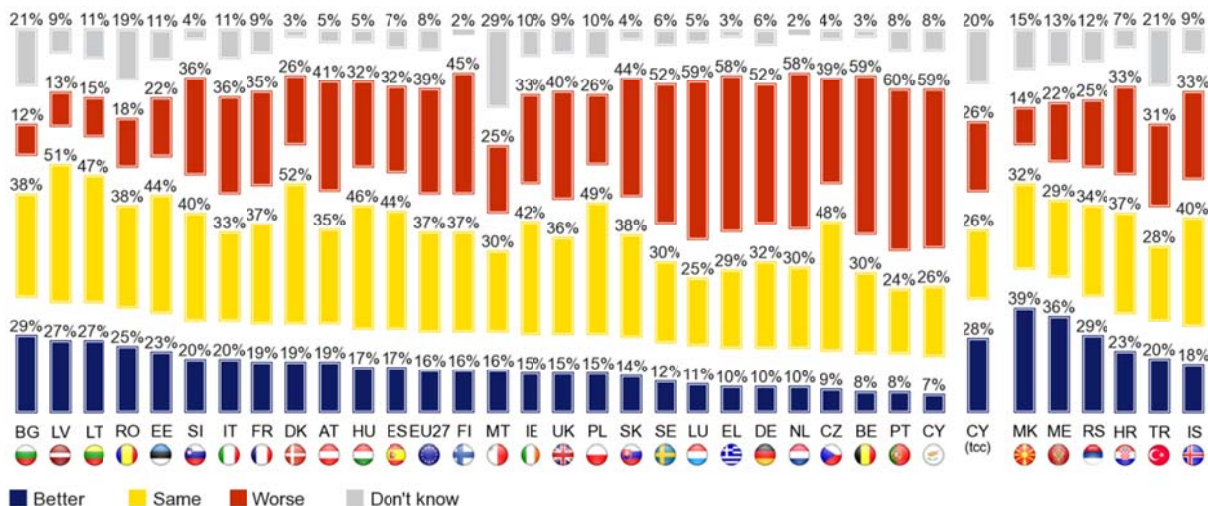
QA4a.2. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

The economic situation in (OUR COUNTRY)



QA4a.6. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

The economic situation in the EU

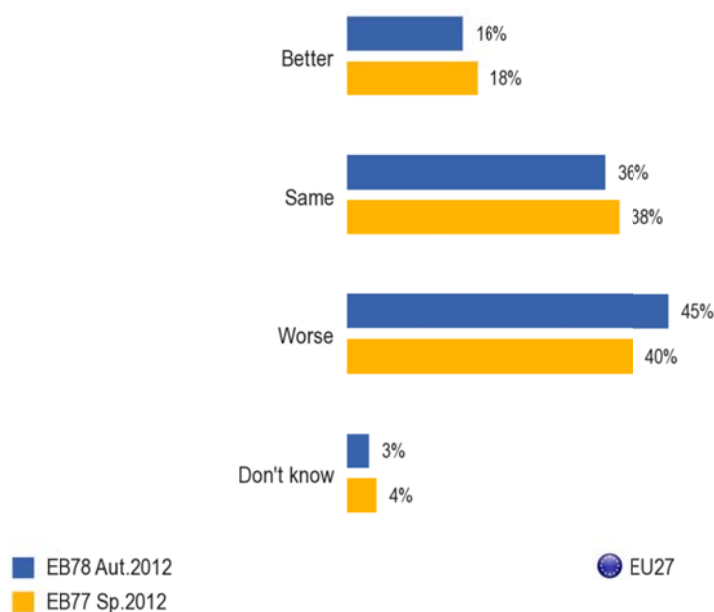


2.2.2. The employment situation

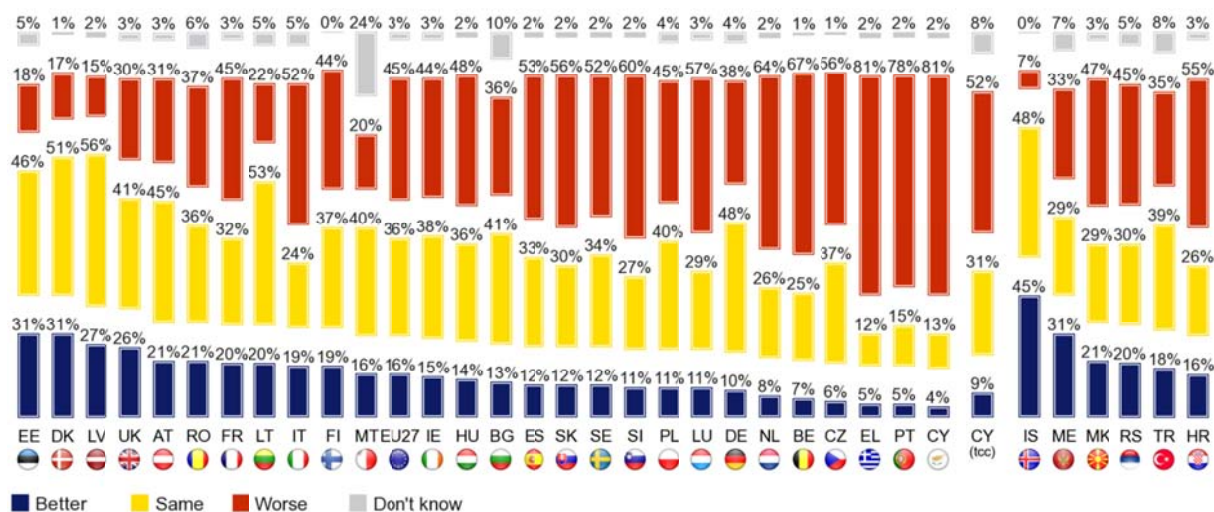
After falling in spring 2012, **pessimism about the national employment situation has increased again**: 45% of Europeans think that the next twelve months will be “worse” (+5 percentage points since spring 2012), a return almost to the level recorded in autumn 2011, when it had gained significant ground in comparison with spring 2011 (46%, +16 at the time). Just over a third of Europeans think that things will stay the same (36%, -2) and only 16% expect things to get better (-2)¹².

QA4a.4. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

The employment situation in (OUR COUNTRY)



QA4a.4. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?
The employment situation in (OUR COUNTRY)



¹² QA4 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same ...? The employment situation in (OUR COUNTRY)

2.3. The main concerns at national level

– Concerns about unemployment and the economic situation have gained even more ground –

The two main national concerns of Europeans were mentioned even more frequently than in spring 2012: **unemployment** (48%, +2 percentage points) and **the national economic situation** (37%, +2).

The ranking of concerns is more or less unchanged. Europeans continue to be very concerned about **rising prices** (24%, =) and **government debt**, though this issue has fallen back slightly (17%, -2).

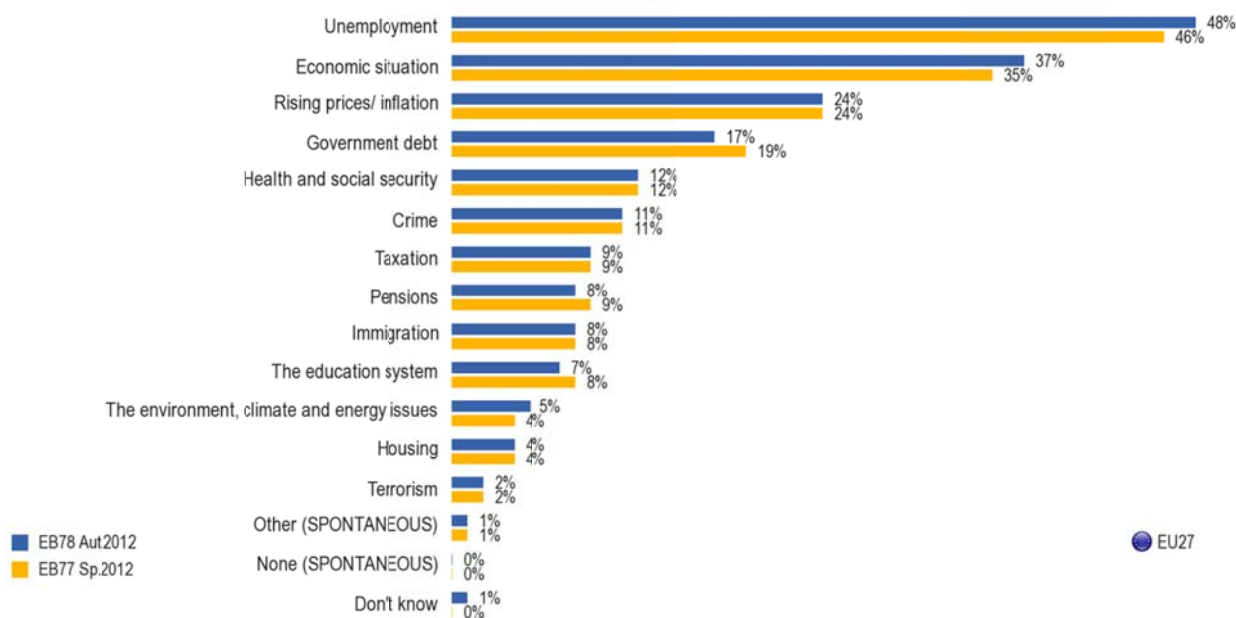
After these economic issues, Europeans mentioned **health and social security** (12%, =) and **crime** (11%, =).

Taxation was mentioned by 9% of respondents (=).

Immigration (8%, =), **pensions** (8%, -1) and **the education system** (7%, -1) obtained similar scores.

Environmental, climate and energy issues (5%, +1), **housing** (4%, =) and **terrorism** (2%, =)¹³ are less urgent matters.

QA5a. What do you think are the two most important issues facing (OUR COUNTRY) at the moment?



Maximum 2 answers

¹³ QA5a What do you think are the two most important issues facing (OUR COUNTRY) at the moment? (MAX. 2 ANSWERS)




































As was the case in spring 2012, there are differences between the **euro area** and non-euro area countries. The first three concerns are the same and are ranked in the same order: unemployment, the economic situation and rising prices. However, euro area respondents then mentioned government debt (19%), while respondents outside the euro area are more concerned about health and social security (14%) and crime (14%, compared with only 12% for government debt).

- **Unemployment** is the main concern in 18 Member States, led by Spain (78%), Cyprus (73%), Ireland (65%), Poland (65%) and Sweden (65%). This concern has gained significant ground since the spring 2012 survey in Belgium (44%, +18), where it is now the first concern, the Netherlands (32%, +12) and Denmark (61%, +10). In contrast, mentions have declined sharply in Estonia (30%, -17) and Portugal (57%, -11).
- **The economic situation** is the main national concern in four Member States: Slovenia (60%), the Netherlands (55%), Romania (48%) and the Czech Republic (37%). This was also the case in Greece in spring 2012, but mentions have fallen significantly (55%, -11), while **taxation** is far now more frequently cited (17%, +8). Fewer respondents also mention the economic situation in Ireland (43%, -12), but it has gained ground in Denmark (58%, +10), Luxembourg (31%, +16) and Sweden (31%, +10), three countries which were previously less affected by increasing concerns about the national economic situation. This issue has also taken on more importance in Belgium (40%, +13).
- **Rising prices** are the primary national concern in four Member States: Estonia (58%), Lithuania (43%), Malta (39%) and Austria (36%). This issue has also gained significant ground in Bulgaria (35%, +7) and Latvia (23%, +6).
- **Government debt** remains the main concern in Germany (34%), but is mentioned significantly less often than in spring 2012 in the Netherlands (14%, -14) and France (16%, -8).

Other points of note:

- Concerns about **health and social security** have increased significantly in the Netherlands (46%, +16) and in Finland (40%, +7).
- Respondents in the United Kingdom are particularly concerned about **crime** (21%) and **immigration** (24%).
- **Taxation** (28%) is at the forefront of concerns in Italy.
- Respondents in Sweden pay particular attention to the **education system** (21%) and **environmental, climate and energy issues** (22%).
- Concerns about **housing** have increased strongly in Portugal (12%, +9). Respondents in Luxembourg are still more likely than average to be concerned about this subject, but less so than in spring 2012 (23%, -13).

QA5a What do you think are the two most important issues facing (OUR COUNTRY) at the moment?

		Unemployment	Economic situation	Rising prices/inflation	Government debt	Health and social security	Crime	Taxation	Pensions	Immigration	The education system	The environment, climate and energy issues	Housing	Terrorism
	EU27	48%	37%	24%	17%	12%	11%	9%	8%	8%	7%	5%	4%	2%
	BE	44%	40%	23%	23%	4%	10%	12%	13%	12%	2%	4%	4%	1%
	BG	55%	41%	35%	1%	21%	16%	4%	10%	1%	5%	3%	1%	0%
	CZ	35%	37%	35%	23%	12%	11%	10%	15%	3%	3%	1%	2%	1%
	DK	61%	58%	10%	6%	9%	13%	5%	1%	9%	9%	12%	1%	1%
	DE	22%	22%	29%	34%	9%	12%	5%	15%	8%	18%	15%	3%	3%
	EE	30%	37%	58%	1%	24%	7%	9%	9%	1%	6%	4%	1%	0%
	IE	65%	43%	14%	21%	10%	15%	8%	2%	9%	5%	1%	3%	0%
	EL	58%	55%	13%	20%	6%	10%	17%	4%	7%	2%	0%	0%	1%
	ES	78%	55%	9%	10%	10%	4%	6%	3%	2%	4%	0%	8%	1%
	FR	59%	35%	20%	16%	10%	18%	6%	7%	9%	5%	3%	7%	2%
	IT	51%	45%	25%	14%	4%	6%	28%	4%	2%	2%	1%	1%	1%
	CY	73%	65%	10%	12%	2%	12%	1%	1%	9%	1%	0%	0%	1%
	LV	51%	41%	23%	8%	14%	5%	18%	10%	11%	5%	0%	2%	0%
	LT	42%	36%	43%	8%	5%	9%	24%	5%	10%	3%	3%	1%	0%
	LU	45%	31%	21%	11%	7%	7%	8%	13%	8%	12%	3%	23%	0%
	HU	59%	40%	30%	24%	9%	11%	5%	5%	1%	3%	2%	2%	1%
	MT	12%	33%	39%	24%	7%	11%	8%	8%	20%	4%	12%	3%	1%
	NL	32%	55%	10%	14%	46%	7%	7%	8%	1%	7%	5%	6%	0%
	AT	26%	32%	36%	24%	11%	11%	10%	10%	12%	11%	8%	3%	1%
	PL	65%	26%	40%	8%	18%	5%	6%	9%	3%	2%	0%	2%	1%
	PT	57%	43%	25%	14%	6%	3%	14%	6%	0%	1%	0%	12%	2%
	RO	32%	48%	37%	6%	16%	20%	9%	12%	1%	7%	1%	3%	1%
	SI	55%	60%	9%	22%	5%	14%	7%	9%	1%	2%	2%	3%	1%
	SK	50%	40%	38%	13%	16%	8%	6%	7%	1%	5%	2%	4%	1%
	FI	44%	28%	17%	21%	40%	6%	7%	8%	5%	4%	12%	4%	1%
	SE	65%	31%	1%	1%	28%	8%	1%	3%	13%	21%	22%	3%	0%
	UK	40%	30%	18%	18%	10%	21%	6%	7%	24%	6%	4%	6%	3%
	CY (tcc)	43%	39%	30%	10%	10%	30%	8%	2%	8%	7%	5%	2%	5%
	HR	72%	47%	22%	12%	2%	28%	5%	4%	0%	1%	0%	1%	1%
	TR	42%	26%	18%	2%	2%	7%	4%	5%	2%	5%	1%	2%	69%
	MK	61%	43%	30%	3%	5%	22%	4%	3%	5%	2%	3%	2%	2%
	IS	19%	51%	23%	22%	33%	5%	11%	5%	1%	10%	6%	10%	1%
	ME	45%	46%	20%	17%	3%	28%	4%	3%	1%	1%	1%	4%	2%
	RS	48%	45%	27%	8%	5%	37%	4%	2%	2%	3%	1%	2%	2%

Highest percentage per country

Lowest percentage per country

Highest percentage by item

Lowest percentage by item

Maximum 2 answers

In the candidate countries:

- Here again, respondents are primarily concerned about either **unemployment** (Croatia, the Former Yugoslav Republic of Macedonia and Serbia) or the **economic situation** (Iceland and Montenegro). Turkey is the exception, as there is much more concern about **terrorism** (69%, the first concern, with a 7-point increase since spring 2012).
- Concerns about **crime** have fallen sharply in Montenegro (28%, -12) and the former Yugoslav Republic of Macedonia (22%, -8), while they are more or less unchanged in Croatia (28%, -1), though this item is still mentioned more than average. However, mentions of crime have increased in Serbia (37%, +8).
- In Iceland, concerns about **health and social security** have increased (33%, +14).

A socio-demographic analysis reveals no striking differences since all categories have strong concerns about unemployment and the economic situation. However, self-employed people are more likely to be concerned about taxation (16%), while managers are more interested in government debt (23%) and the education system (12%). These two subjects are comparatively less mentioned by white-collar and manual workers and unemployed people, who are more likely to be concerned about rising prices (23%, 27% and 24% respectively).

2.4. The main concerns at European level

– Unemployment is now seen as the second most important issue facing the European Union –

Europeans still consider that **the economic situation** is by far the most important issue facing the European Union (53%, -1 percentage point), but the proportion of respondents mentioning **unemployment** has increased and this issue is now ranked in second place (36%, +4). By comparison, unemployment was mentioned by only 23% of respondents in the spring 2011 Standard Eurobarometer survey (EB75), and its score has increased continuously since then (now +13).

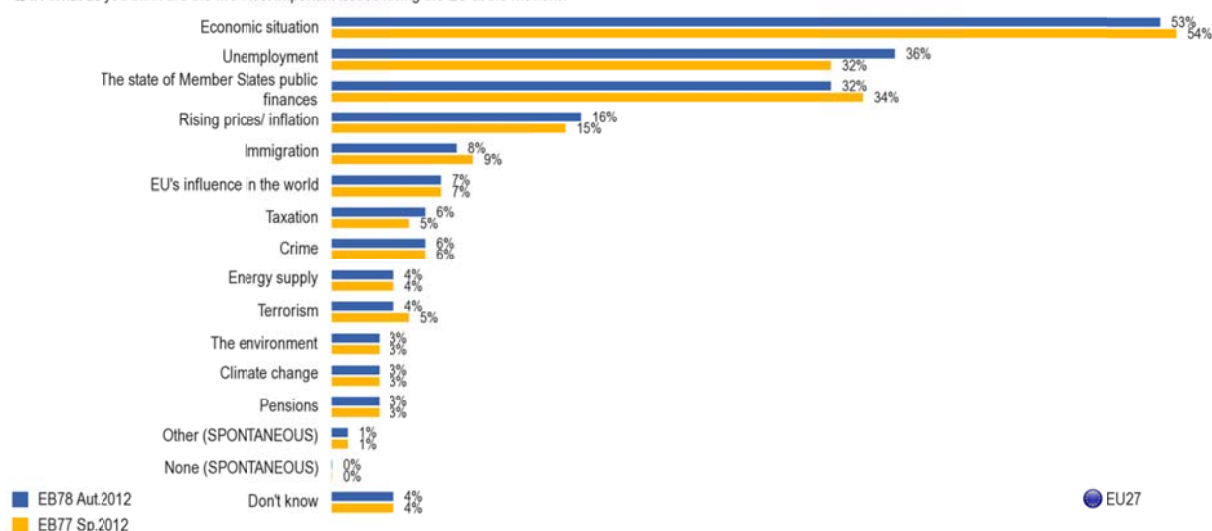
The state of Member States' public finances is still mentioned by almost a third of Europeans, despite a slight decrease (32%, -2).

Next was mentioned **rising prices** (16%, +1), confirming the extent to which the concerns of Europeans are dominated by economic issues.

The remainder of the ranking is stable. **Immigration** (8%, -1) is just ahead of the **EU's influence in the world** (7%, =), **crime** (6%, =) and **taxation** (6%, +1).

Terrorism was mentioned by 4% of respondents (-1), as were **energy supplies** (4%, =). **Climate change** (3%, =) and the **environment** (3%, =) continue to be seen as less urgent concerns, as do **pensions** (3%, =)¹⁴.

QA7. What do you think are the two most important issues facing the EU at the moment?



Maximum 2 answers

Overall, perceptions of the main issues facing the European Union are fairly similar within and outside the **euro area**, despite some differences in the level of mentions.





























For example, euro area respondents are more likely to mention the **state of Member States' public finances** (34% compared with 27% outside the euro area) and **unemployment** (38% pour 33%).

¹⁴ QA7 What do you think are the two most important issues facing the EU at the moment? (MAX. 2 ANSWERS)

Points of note:

- **The economic situation** is seen as the most important problem facing the European Union in almost all the Member States, except for Germany and Austria, where respondents first mentioned **the state of Member States' public finances** (55% and 57% respectively), and Luxembourg where **unemployment** tops the list of issues facing the EU (50%).
- Respondents are less likely than in spring 2012 to mention the **economic situation**, especially in Greece (54%, -12) and Cyprus (59%, -9). Belgium is an exception, with a significant increase (56%, +12).
- After rising spectacularly in several Member States in spring 2012, concerns about **unemployment** have yet again risen significantly in Belgium (39%, +9), the Czech Republic (30%, +9), Denmark (54%, +8), France (36%, +8), Slovenia (39%, +8), Slovakia (30%, +9) and Finland (27%, +8). It has lost ground in Portugal (43%, -11), but is still above the European average.
- Concerns about the **state of Member States' public finances** have fallen in Ireland (26%, -15) and France (29%, -10) where they had increased strongly in spring 2012 (with increases of +7 and +8 respectively compared with autumn 2011).

QA7 What do you think are the two most important issues facing the EU at the moment?

		Economic situation	Unemployment	The state of Member States public finances	Rising prices/inflation	Immigration	EU's influence in the world	Taxation	Crime	Energy supply	Terrorism	The environment	Climate change	Pensions
	EU27	53%	36%	32%	16%	8%	7%	6%	6%	4%	4%	3%	3%	3%
	BE	56%	39%	32%	15%	13%	5%	4%	5%	4%	3%	4%	6%	4%
	BG	56%	34%	15%	12%	14%	6%	3%	9%	4%	15%	4%	4%	2%
	CZ	47%	30%	40%	13%	9%	7%	4%	6%	5%	6%	4%	2%	5%
	DK	71%	54%	26%	4%	8%	4%	0%	6%	3%	3%	4%	10%	0%
	DE	47%	26%	55%	15%	8%	6%	3%	5%	7%	3%	3%	5%	3%
	EE	53%	23%	40%	14%	10%	6%	4%	6%	5%	4%	2%	1%	2%
	IE	58%	46%	26%	15%	7%	8%	9%	6%	2%	4%	2%	2%	1%
	EL	54%	46%	36%	10%	12%	11%	3%	8%	1%	3%	2%	1%	1%
	ES	64%	50%	23%	10%	4%	7%	5%	1%	2%	2%	2%	2%	2%
	FR	53%	36%	29%	15%	14%	8%	1%	7%	4%	7%	7%	3%	3%
	IT	51%	44%	15%	25%	5%	4%	19%	5%	3%	4%	2%	1%	3%
	CY	59%	58%	31%	10%	13%	3%	2%	14%	1%	1%	0%	1%	2%
	LV	49%	25%	33%	12%	10%	6%	7%	6%	2%	4%	2%	2%	2%
	LT	50%	26%	23%	16%	10%	5%	8%	8%	7%	5%	1%	3%	1%
	LU	48%	50%	31%	11%	12%	4%	2%	6%	5%	5%	3%	4%	5%
	HU	51%	33%	49%	14%	7%	6%	3%	5%	6%	3%	1%	5%	2%
	MT	51%	24%	35%	10%	19%	4%	4%	5%	8%	5%	3%	3%	3%
	NL	68%	35%	47%	6%	4%	11%	3%	3%	2%	3%	2%	3%	2%
	AT	47%	24%	57%	15%	9%	10%	4%	9%	4%	4%	7%	5%	2%
	PL	47%	35%	24%	23%	7%	6%	4%	5%	2%	6%	2%	2%	4%
	PT	47%	43%	27%	17%	1%	9%	6%	4%	1%	5%	1%	0%	2%
	RO	53%	27%	22%	17%	7%	6%	6%	16%	2%	7%	4%	3%	4%
	SI	60%	39%	43%	7%	4%	7%	4%	8%	3%	2%	1%	3%	2%
	SK	55%	30%	41%	18%	5%	9%	3%	7%	3%	5%	3%	3%	2%
	FI	49%	27%	44%	11%	6%	12%	3%	11%	6%	5%	8%	10%	2%
	SE	73%	41%	27%	2%	7%	5%	1%	3%	4%	2%	12%	17%	1%
	UK	50%	31%	27%	14%	14%	7%	5%	6%	5%	4%	2%	3%	2%

Highest percentage per country

Lowest percentage per country

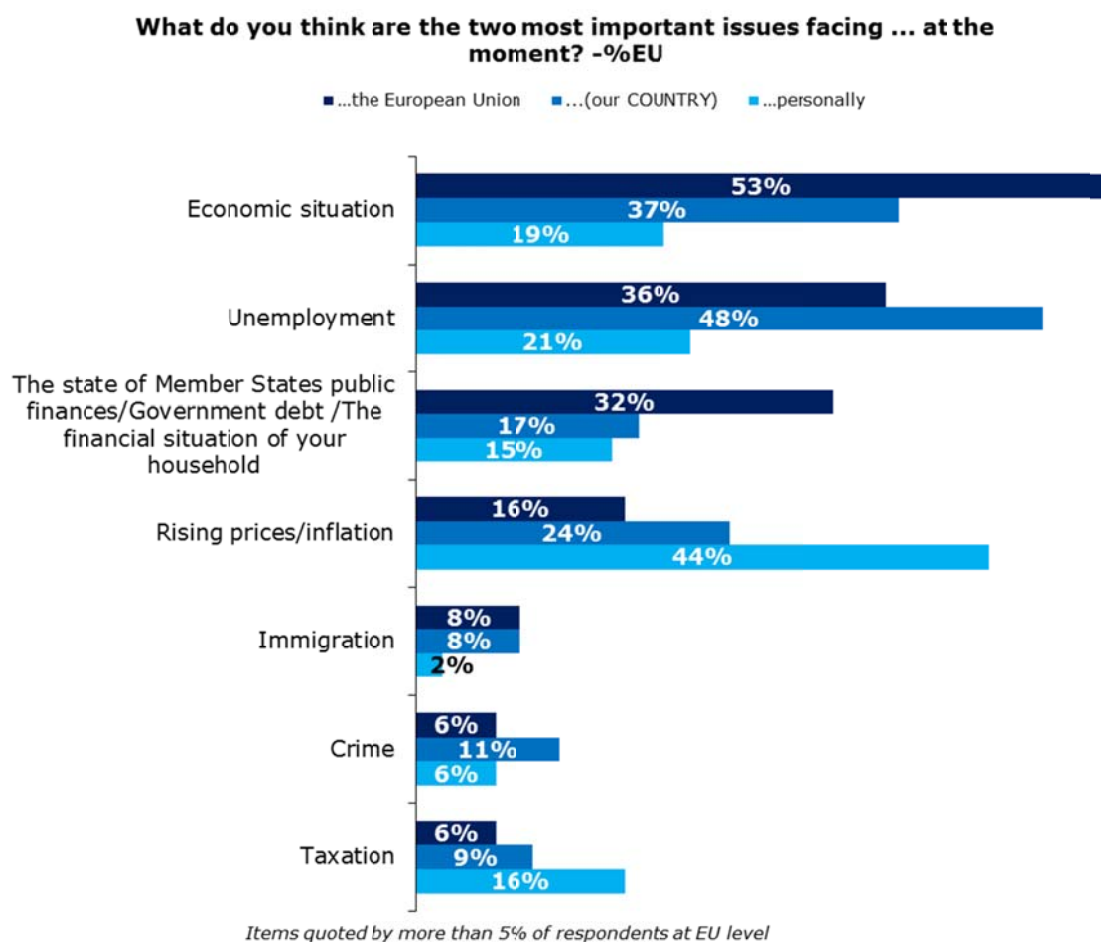
Highest percentage by item

Lowest percentage by item

Maximum 2 answers

Strictly speaking, personal, national and European concerns cannot be compared directly, because the lists of items are not identical. Nonetheless, we note that:

- Economic issues continue to outweigh social and societal issues at personal, national and European levels.
- Concerns about unemployment at the national and European levels have continued to rise significantly, in a context of growing pessimism about jobs and the employment outlook.
- Europeans continue to be concerned about government debt at national and European levels, despite a slight decline in the context of a growing focus on unemployment.
- However, the personal concerns of respondents continue to be dominated by rising prices. In autumn 2012, this is combined with an increasing concern about taxation.
- Immigration and crime are seen as far less urgent issues when respondents are asked about their person situation. However, immigration is seen as more of an issue at European level, while crime seems to be seen as a more relevant subject at national level.



3. POLITICAL ASPECTS

3.1. Interest in politics

The index of interest in politics, constructed on the basis of questions on the respondent's interest in local, national and European politics, has undergone very few changes since the spring 2012 Standard Eurobarometer survey (EB77)¹⁵:

- The majority of Europeans continue to be "moderately" interested in politics (45%, +1 percentage point since spring 2012).
- Those who follow politics very closely ("strong" interest) represent 16% of respondents (=).
- Just under a quarter of Europeans are "slightly" interested in politics (22%, -1) and 17% are "not at all interested" (=).
- In total, more than six out of ten Europeans are interested, either strongly or moderately, in politics (61%).

This index of interest in politics changed very little since the spring 2010 Eurobarometer survey (EB73), when it was measured for the first time. At that time, 14% of Europeans had a "strong" interest in politics, 43% were "moderately" interested, 24% were "slightly" interested and 19% were "not at all interested".

Europeans continue to be most interested in national political matters (76%), just ahead of local political matters (74%). A smaller majority of respondents are also interested in European political matters (63%)¹⁶.

More specifically, respondents in Greece continue to be particularly interested in politics (40% have a "strong" index), although this proportion has fallen by five percentage points since spring 2012, as are those in the Netherlands (26%, -5), Germany (23%, +3), Sweden (22%, +1), Cyprus (22%, -1) and Denmark (21%, -2).

¹⁵ A score was attributed to each answer: "Never" = 0; "Occasionally" = 1; "Often" = 2. An index was then constructed by adding together the scores for the three dimensions (local, national and European). Each group corresponds to a different index level: "not at all interested in politics" = 0; "slightly" = 1 to 2; "moderately" = 3 to 4; "strongly" = 5 to 6.

¹⁶ QA2. When you get together with friends or relatives, would you say that you discuss frequently, occasionally or never about ...? National political matters/European political matters/Local political matters

A socio-demographic analysis reveals a number of differences between categories. Interest in politics:

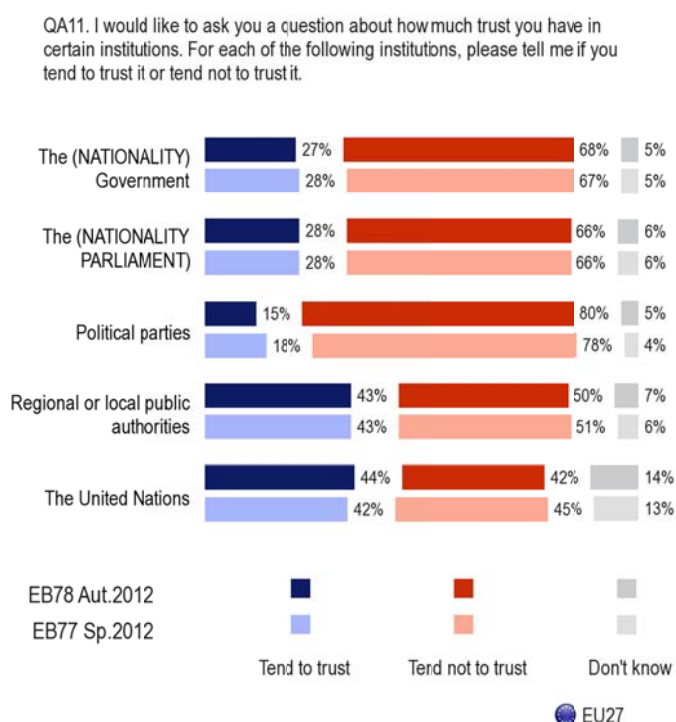
- Increases with age: only 8% of 15-24 year-olds have a “strong” interest in politics, compared with 20% of those aged 55 or over. However, when we aggregate the “strong” and “moderate” categories, the 40-54 age group has the highest proportion of people interested in politics (65%, versus 64% among those aged 55 or over and 45% among those aged 15 to 24).
- Is far stronger among the respondents who studied the longest (73% of those who studied up to the age of 20 or beyond have a strong or moderate interest in politics compared with 49% of those who left school before the age of 16).
- There are also differences according to the respondent’s occupational category: managers (78%) are more likely than white-collar workers (66%) and manual workers (57%) to be interested in politics.

3.2. Trust in institutions

Only a minority of Europeans trust their national institutions.

Levels of trust have stabilised after increasing slightly in spring 2012: 27% tend to trust their **government** (-1 percentage point, versus 68% who distrust it, +1) and 28% trust their country's **parliament** (=, versus 66%, =)¹⁷.

Trust had declined significantly in the autumn 2011 Standard Eurobarometer survey (EB76), and remains below the levels recorded in spring 2011 (when 32% trusted their government and 33% trusted their parliament).



A majority of respondents trust their government and parliament in four Member States: Luxembourg (57% and 48% respectively), Austria (49% and 50%), Finland (62% and 66%) and Sweden (59% and 68%). In two other countries majorities trust their parliament: Denmark (63%) and the Netherlands (53%), but fewer trust their government.

Trust in national political institutions has decreased in Estonia (35%, -8 for the government and 29%, -7 for the parliament), France (30%, -14 and 32%, -10), where trust had increased significantly in the wake of the Presidential election in May 2012, Luxembourg (57%, -11 and 48%, -7) and Slovakia (32%, -11 and 30%, -9), where again trust had risen in the aftermath of the March parliamentary elections.

In the candidate countries:

- Distrust is dominant in all countries, particularly in Croatia (more than 75% of respondents distrust both the government and the parliament).
- Trust has fallen sharply in Turkey after rising in spring 2012 (45%, -12 percentage points for the government and 44%, -10 for the parliament)
- In Montenegro and Iceland, trust has increased (Montenegro: 38% for the government, +4, and 39% for the parliament, +10; Iceland: 31% for the government, +5 and 32% for the parliament, +7); however it is still the minority position.

¹⁷ QA11. I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it.

A clear majority of respondents in all the Member States still tend not to trust political parties: 80%, an increase of two percentage points. Distrust has increased sharply in Luxembourg (70%, +15), France (83%, +11), after falling in spring 2012 in the wake of the Presidential election, but also in Belgium (76%, +9), where all the indicators measuring trust and future expectations have deteriorated.

Trust in regional and local public authorities is stable, but remains the minority position (43%, =, versus 50%, -1). A majority of respondents in 13 Member States trust these authorities, led by Denmark (70%), Austria (69%), Luxembourg (68%) and Finland (67%). Trust has increased significantly in Portugal (48%, +14) and Hungary (55%, +11), but has fallen in France (53%, -9) and Cyprus (38%, -9).

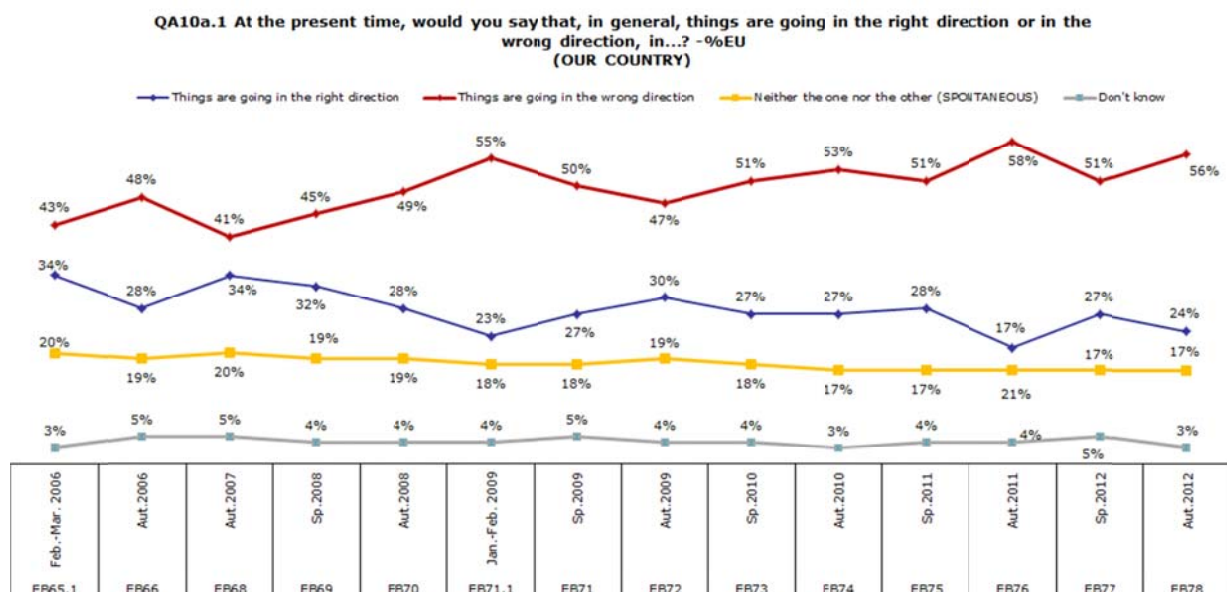
After trending downwards (-6 percentage points between the spring 2011 Eurobarometer survey and the spring 2012 survey), **trust in the United Nations has increased**. As a result a very narrow majority of Europeans now trust this institution (44%, +2, versus 42% who tend not to trust it, -3). Although the majority is very narrow at European level, it nevertheless exists in 20 Member States. The exceptions are Greece (77% distrust the UN), Cyprus (69%), Spain (59%), Slovenia (58%) and Italy (48%), though distrust has fallen by nine percentage points in Italy. Opinions are evenly divided in the United Kingdom (at 44%) and Germany (41%). Respondents in Finland (72%), Denmark (71%) and Sweden (71%) are the most likely to trust the United Nations.

Trust has increased in Portugal (46%, +10) where it now again commands a narrow majority (versus 43%).

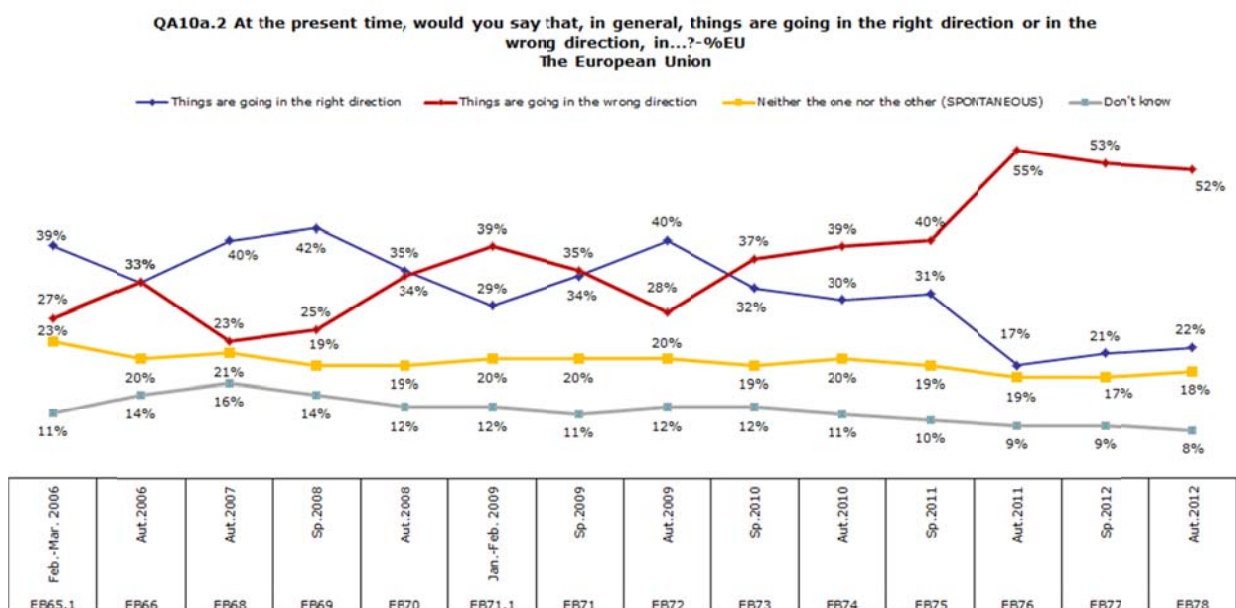
3.3. The direction in which things are going

- The impression that things are going in the wrong direction nationally has gained ground. Opinions on the EU situation are relatively stable –

Having increased significantly in the autumn 2011 Standard Eurobarometer survey (EB76), and then fallen in the spring 2012 Standard Eurobarometer survey (EB77), the impression that things are going in the wrong direction at national level has again increased sharply: 56% (+5 percentage points, versus 24% “in the right direction”, -3)¹⁸.



A majority of Europeans also think that things are going in the wrong direction **in the European Union**, but opinions are more stable: 52% (-1, versus 22%, +1).



¹⁸ QA10 At the present time, would you say that, in general, things are going in the right direction or in the wrong direction?

Opinions on the direction taken nationally are similar in the euro area (56% replied “wrong direction”) and the non-euro area countries (57%). However, euro area respondents are slightly more critical than non-euro area respondents of the direction taken by the European Union (54% versus 49%).

Majorities in only two Member States (compared with seven in spring 2012) now think that things are going in the right direction nationally, though these majorities have fallen in both cases: Denmark (46%, -5, versus 42%, +5) and Austria (39%, -8, versus 30%, +4). Opinions are evenly divided in Sweden, where perceptions have deteriorated sharply (44%, -12, versus 44%, +10).

In several Member States negative opinions of the direction in which things are going nationally have hardened since the spring 2012 Eurobarometer survey. Often these are the countries which had seen significant improvements at that time: Belgium (65% think that things are going in the wrong direction, +26 percentage points), France (61%, +24), Romania (68%, +16), Cyprus (80%, +15), Luxembourg (44%, +15), Slovakia (59%, +15) and Slovenia (67%, +14).



































The belief that things are going in the right direction at national level is therefore declining not only in the countries which were predominantly critical in the past but also in countries which previously seemed to be relatively immune.

Note that there has been a significant improvement in Ireland although opinions remain predominantly negative (28% answered “right direction”, +8, versus 47%, +1).

In three Member States majorities continue to believe that things are going in the right direction in the European Union (compared with five in spring 2012): Bulgaria (49% versus 11%), Lithuania (40% versus 20%) and Latvia (35% versus 23%). Opinions are evenly divided in Estonia (at 29%) as a result of a decrease in positive opinions (-7). However, opinions in Romania have hardened and are now predominantly negative (30%, -10, versus 34%).

The impression that things are going in the right direction in the European Union has also lost ground in Belgium (15%, -9) and Cyprus (6%, -10). However, it has gained support in Ireland (30%, +13), while remaining the minority position.

QA10a. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...?

	(OUR COUNTRY)				The European Union			
	Things are going in the right direction	Diff Aut.2012 - Sp.2012	Things are going in the wrong direction	Diff Aut.2012 - Sp.2012	Things are going in the right direction	Diff Aut.2012 - Sp.2012	Things are going in the wrong direction	Diff Aut.2012 - Sp.2012
 EU27	24%	-3	56%	+5	22%	+1	52%	-1
 BE	17%	-21	65%	+26	15%	-9	67%	+12
 BG	27%	+4	40%	-6	49%	+3	11%	-6
 CZ	12%	-3	75%	+2	22%	=	53%	-1
 DK	46%	-5	42%	+5	31%	=	53%	=
 DE	33%	-7	35%	+2	20%	=	49%	-4
 EE	27%	-10	41%	+6	29%	-7	29%	+5
 IE	28%	+8	47%	+1	30%	+13	45%	+1
 EL	4%	=	88%	+3	9%	-1	74%	=
 ES	10%	-2	79%	+5	18%	+1	60%	+2
 FR	23%	-13	61%	+24	22%	-1	56%	+5
 IT	12%	+2	61%	+1	17%	+6	50%	-5
 CY	4%	-8	80%	+15	6%	-10	71%	+13
 LV	27%	-1	40%	+3	35%	-2	23%	+1
 LT	23%	=	47%	-5	40%	+4	20%	-11
 LU	33%	-13	44%	+15	21%	-4	63%	+9
 HU	14%	+3	66%	-3	20%	+3	41%	-5
 MT	30%	-2	46%	+6	22%	+5	51%	+5
 NL	29%	=	37%	-1	19%	+1	48%	-8
 AT	39%	-8	30%	+4	24%	+2	46%	-3
 PL	26%	=	63%	+3	38%	+6	43%	+2
 PT	17%	=	65%	+8	17%	-1	53%	+7
 RO	14%	-12	68%	+16	30%	-10	34%	+9
 SI	12%	-9	67%	+14	26%	-3	42%	+3
 SK	23%	-12	59%	+15	28%	-4	49%	+2
 FI	36%	-13	47%	+9	25%	=	60%	-6
 SE	44%	-12	44%	+10	22%	-2	67%	+3
 UK	38%	+6	50%	-5	19%	+5	63%	-5
 CY (tcc)	11%	+3	71%	-2	31%	+1	24%	-6
 HR	19%	-8	67%	+7	32%	-3	44%	-2
 TR	37%	-12	46%	+7	27%	-4	46%	+3
 MK	28%	-2	48%	-1	43%	-3	19%	-3
 IS	57%	+9	34%	-11	31%	+6	46%	-8
 ME	35%	+12	37%	-8	40%	+3	25%	-3
RS	20%	+1	50%	-7	29%	=	32%	-1

In the candidate countries:




- A majority of respondents are negative about the **direction in which things are going in their country**, except in Iceland, where positive opinions have gained significant ground (57%, +9). Opinions have also improved in Montenegro (35%, +12). However, after an improvement in spring 2012, perceptions of the direction taken nationally have deteriorated sharply in Turkey (37%, -12).
- Opinions of the direction taken in **the European Union** are now predominantly positive in the Former Yugoslav Republic of Macedonia (43% versus 19%) and Montenegro (40% versus 25%), but are mainly negative in Turkey (27% versus 46%), Iceland (31% versus 46%), Croatia (32% versus 44%) and Serbia (29% versus 32%).

The results of the socio-demographic analysis mirror the trends noted for the economic situation at national and European levels¹⁹:

- The respondent's age has little influence on opinions on **the direction taken nationally**. However, education creates more pronounced differences: only 18% of those who left school before the age of 16 think that things are going in the right direction in their country, compared with 29% of Europeans who studied up to the age of 20 or beyond. Managers are also more positive (36%) than white-collar workers (23%), manual workers (22%) and unemployed people (14%). Europeans who position themselves at the bottom of the social scale are also more critical of the direction taken by their country (14%) than those who place themselves at the top (34%).
- In the case of the **European Union**, the generational divide is more perceptible: while 28% of those in the 15-24 age group believe that things are going in the right direction, only 19% of Europeans aged 55 or over agree. The most educated respondents remain more positive (27%) than those who left school before the age of 16 (14%). Occupation makes less difference at European than at national level (28% of managers think that things are going in the right direction compared with 24% of white-collar and 21% of manual workers), although unemployed people remain more critical (17%). Subjective social classification remains a significant factor: 29% of the Europeans who position themselves at the top of the social scale consider that things are going in the right direction in the European Union, compared with only 17% of those who place themselves at the bottom.

¹⁹ Cf. QA3 2.1.1. The national, European and world situations, page 20.

QA10a At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...?

	(OUR COUNTRY)				The European Union			
	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SPONTANEOUS)	Don't know	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SPONTANEOUS)	Don't know
EU27	24%	56%	17%	3%	22%	52%	18%	8%
 Sex								
Men	27%	55%	16%	2%	24%	53%	17%	6%
Women	22%	57%	17%	4%	20%	51%	18%	11%
 Age								
15-24	26%	54%	17%	3%	28%	45%	19%	8%
25-39	23%	58%	16%	3%	23%	52%	18%	7%
40-54	24%	57%	16%	3%	22%	56%	15%	7%
55 +	24%	55%	17%	4%	19%	53%	18%	10%
 Education (End of)								
15-	18%	63%	15%	4%	14%	57%	18%	11%
16-19	23%	58%	16%	3%	21%	53%	18%	8%
20+	29%	51%	17%	3%	27%	51%	16%	6%
Still studying	30%	48%	19%	3%	32%	41%	19%	8%
 Socio-professional category								
Self-employed	25%	53%	19%	3%	21%	52%	20%	7%
Managers	36%	44%	16%	4%	28%	53%	13%	6%
Other white collars	23%	58%	16%	3%	24%	53%	18%	5%
Manual workers	22%	59%	16%	3%	21%	55%	16%	8%
House persons	20%	60%	15%	5%	19%	53%	18%	10%
Unemployed	14%	70%	14%	2%	17%	57%	17%	9%
Retired	24%	55%	17%	4%	19%	52%	18%	11%
Students	30%	48%	19%	3%	32%	41%	19%	8%
Self-positioning on the social staircase								
Low (1-4)	14%	67%	15%	4%	17%	55%	17%	11%
Medium (5-6)	24%	56%	16%	4%	22%	53%	17%	8%
High (7-10)	34%	46%	17%	3%	29%	48%	17%	6%

II. THE EUROPEAN UNION AND ITS CITIZENS

1. ATTACHMENT TO THE EUROPEAN UNION

1.1. What does the European Union represent?

The ranking of the representations associated with the European Union has not changed since the previous survey conducted in spring 2012. With a score of 42% (+1 percentage point) “the freedom to travel, study and work anywhere in the EU” stands in first place, ahead of “the euro” (35%, -2), “waste of money” (27%, unchanged), “peace” (26%, +2) and “bureaucracy” (23%, unchanged)²⁰. Evolutions are only minor, and none exceeds two percentage points (-2 for the euro; +2 for peace and unemployment).

The euro is far more likely to be seen as a symbol of the EU in the EU15 countries (39%) and within the euro area (44%) than in the NMS12 countries (22%) and countries outside the euro area (18%). There are fewer differences as regards freedom of movement within the European area: although this item is mentioned more frequently in the NMS12 countries than in the EU15 (49% versus 40%), it was mentioned equally within and outside the euro area (42%). Waste of money is mentioned more often in the EU15 countries (30%) and euro area countries (29%) than in the NMS12 (15%) and outside the euro area (22%).

A national analysis reveals that the most frequently mentioned representation, irrespective of the country, is either freedom of movement within the European area or the euro, except in the United Kingdom where, as in spring 2012, waste of money is the first item mentioned (31% versus 27% and 16% respectively).

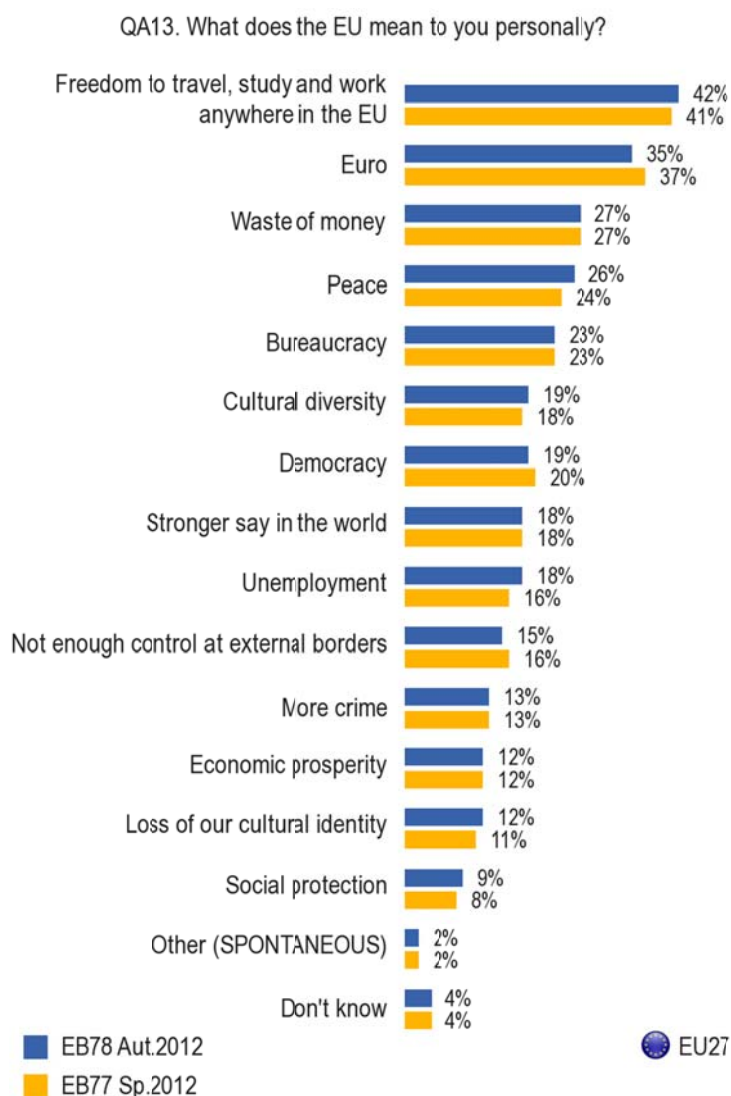
As was the case in previous surveys, **freedom of movement within the European Union** was mentioned most frequently in the Nordic countries (65% in Sweden, 59% in Finland and 55% in Denmark) and the Baltic States (67% in Estonia, 60% in Lithuania and 59% in Latvia), as well as in Luxembourg (59%) and Germany (56%). The highest scores for the **euro** were recorded in Austria (67%), Finland (57%), Belgium (55%), the Netherlands (54%) and Slovakia (53%). Respondents in Austria (54%), Germany (46%) and Sweden (42%) continue to be most likely to mention **waste of money**, while respondents in Sweden (44%), Finland (44%) and Austria (42%) are far more likely than the European average (23%) to mention **bureaucracy**.

The most striking changes for this indicator are recorded in Greece: mentions of the euro (49%) and freedom of movement (37%) have fallen by eight and two percentage points respectively, while unemployment has seen a 10-point rise to 45%. This item now stands in second place in the list of representations associated with the European Union in this country.

²⁰ QA13. What does the EU mean to you personally? (Multiple answers possible)




































A socio-demographic analysis shows that negative representations of the EU are systematically more pronounced among the oldest respondents and those who studied the least, whereas the youngest respondents and those who stayed the longest in full-time education are more likely to mention the positive representations:

- Freedom of movement within the EU was mentioned by 52% of those who studied up to the age of 20 or beyond and by 51% of 15-24 year-olds, compared with 35% of those aged 55 or over and 27% of those who left school before the age of 16.
- Conversely, the waste of money was mentioned far more frequently by those aged 55 or over and the least educated respondents (30%) than by 15-24 year-olds (18%) and those who remained in full-time education up to at least the age of 20 (24%).



Multiple answers possible

QA13 What does the EU mean to you personally?

	Freedom to travel, study and work anywhere in the EU	Diff Aut.2012-Sp.2012	Euro	Diff Aut.2012-Sp.2012	Waste of money	Diff Aut.2012-Sp.2012	Peace	Diff Aut.2012-Sp.2012	Bureaucracy	Diff Aut.2012-Sp.2012
 EU27	42%	+1	35%	-2	27%	=	26%	+2	23%	=
 DE	56%	+6	49%	-3	46%	+1	45%	+3	37%	-6
 SE	65%	+5	18%	-3	42%	+4	45%	+8	44%	=
 FR	42%	+4	40%	-1	32%	+2	35%	+1	17%	+3
 FI	59%	+3	57%	+11	30%	-4	30%	+9	44%	+7
 ES	36%	+3	40%	-4	18%	-1	10%	-1	21%	+3
 AT	52%	+2	67%	-2	54%	-4	39%	+4	42%	-1
 PL	47%	+2	18%	-2	10%	-4	19%	+4	20%	-1
 IT	28%	+2	39%	-1	17%	-3	14%	=	8%	-1
 MT	45%	+1	25%	-2	17%	=	27%	+3	16%	+3
 EE	67%	=	33%	+1	21%	+1	21%	+3	25%	+3
 LU	59%	=	44%	+2	24%	-2	41%	+4	17%	+2
 SI	51%	=	43%	-3	28%	+2	28%	+1	27%	+2
 HU	44%	=	18%	+2	17%	-2	19%	=	15%	-1
 BE	37%	=	55%	+1	32%	+2	26%	-1	19%	+3
 UK	27%	=	16%	-1	31%	+1	16%	+2	27%	=
 PT	31%	-1	30%	+2	21%	+2	7%	-1	7%	+2
 LV	59%	-2	11%	=	14%	=	14%	-2	17%	+2
 NL	52%	-2	54%	=	23%	+1	33%	+5	35%	+3
 RO	52%	-2	28%	-4	11%	-1	31%	-5	10%	+1
 EL	37%	-2	49%	-8	22%	+9	24%	-6	12%	+4
 LT	60%	-3	11%	=	13%	-2	16%	+4	13%	+3
 DK	55%	-3	21%	+2	18%	-1	46%	+2	38%	+2
 BG	52%	-3	12%	-6	8%	=	29%	+1	7%	-1
 SK	54%	-4	53%	-6	31%	+3	17%	=	21%	-2
 CY	44%	-5	33%	-4	21%	=	25%	-5	15%	=
 IE	37%	-5	28%	-18	14%	+2	12%	-2	16%	=
 CZ	44%	-6	17%	-6	36%	-3	23%	+1	31%	+1
 CY (tcc)	40%	+1	12%	-2	7%	+3	24%	-4	7%	+1
 HR	55%	+5	15%	+1	12%	-1	22%	+1	15%	+2
 RS	36%	+4	16%	+4	8%	=	23%	=	8%	=
 MK	47%	+1	7%	-2	5%	=	34%	-6	3%	-1
 IS	55%	=	41%	+2	28%	+6	26%	+6	34%	+3
 ME	40%	-1	10%	-8	8%	+1	31%	-1	6%	-1
 TR	23%	-8	16%	-1	11%	+4	17%	+1	9%	+2

Multiple answers possible - 5 most frequently mentioned items

1.2. Support for EU membership and the perceived benefits of membership (candidate countries)

This Standard Eurobarometer survey measured support within the candidate countries for European membership²¹ and perceptions of the expected benefits of membership²². The same questions were asked in the previous survey in spring 2012 (EB77), which will therefore be used for comparison.

After increasing between autumn 2011 and spring 2012, doubtless as a result of the “yes” vote in the referendum on 22 January 2012 on Croatia’s accession to the EU, support for European membership has declined in this country²³.

Respondents in Croatia are now divided into three more or less equal groups: 31% (-7 percentage points since spring 2012) consider that joining the European Union would be a good thing for their country, whereas 32% (+6) take the opposite view and 33% (-1) think that it would be “neither good nor bad”. Whereas in spring 2012, for the first time, more people supported than opposed Croatia’s membership of the EU, the ratio has been reversed in this survey. This change may be due to a declining perception of the benefits of European membership: 46% of respondents in Croatia (-5) consider that their country would benefit from joining the EU, while 44% (+5) think that it would not. Between spring and autumn 2012, the ratio of opinions on the benefits of membership has therefore narrowed significantly.

A large majority of respondents in the Former Yugoslav Republic of Macedonia continue to favour European membership, despite an erosion in support: 57% of respondents in this country are positive about EU membership, but this proportion has fallen by five percentage points since spring 2012 and by eight percentage points since spring 2011. Two-thirds of respondents (66%) are convinced of the benefits of European membership, a decline of four percentage points since spring 2012 (EB77) and eight percentage points since spring 2011 (EB75).

After a sharp fall in the previous survey, support for European membership has recovered in Montenegro: 50% of respondents (+3 percentage points) are in favour of European membership, while 13% (-1) are opposed, 29% (-2) say that it would be “neither good nor bad” and 8% (unchanged) expressed no opinion. The view that European membership would be a benefit has gained ground, and is held by a large majority of respondents (59%, +4).

At the time of the spring 2012 Standard Eurobarometer survey, the ratio of opinions on European membership had narrowed considerably in Turkey due to a significant increase in negative opinions. Overall views are relatively stable in this new survey in autumn 2012.

²¹ QA8. Generally speaking, do you think that (OUR COUNTRY)’s membership of the EU would be a good thing, a bad thing, neither good nor bad?

²² QA9. Taking everything into consideration, would you say that (OUR COUNTRY) would benefit or not from being a member of the EU?

²³ 66.27% of Croats voted yes to EU membership in the referendum on 22 January 2012, which was marked by a low turnout (43.5%).

More than a third of respondents in Turkey (36%, -1 percentage point) are in favour of EU membership, while 33% (-2) are against it, 19% (+3) think that it would be “neither good nor bad” and 12% (unchanged) expressed no opinion. However, there are more marked evolutions in perceptions of the benefits of membership: 40% (-4) think that Turkey would benefit from EU membership, while 44% (+7) think otherwise and 16% (-3) expressed no opinion.

Opposition to EU membership has fallen slightly in Iceland, but is still the majority position: 44% (-2 percentage points) of respondents believe that European membership would be “a bad thing”, whereas 26% (+5) think that it would be “a good thing”. Almost a quarter of respondents (23%, -7) say that European membership would be “neither good nor bad” and 7% (+4) expressed no opinion. A majority of respondents continue to believe that Iceland would not benefit from European membership (57%), but this view has lost seven percentage points since spring 2012.

Finally, support for European membership in Serbia, which was measured for the first time in the spring 2012 Standard Eurobarometer survey, has fallen: 35% of respondents (-5 percentage points) are positive about EU membership, while 34% (+6) say it would be neither good nor bad and 23% (-1) oppose membership. The decline in positive opinions has been matched by an identical increase in the number of “neither good nor bad” answers. The trend towards less pro-European attitudes in Serbia is even more striking in the case of the perceived benefits of membership: 40% of respondents (-9) think that their country would benefit from joining the EU while 35% (+4) take the opposite view and a significant proportion are unable to reply (25%, +5).

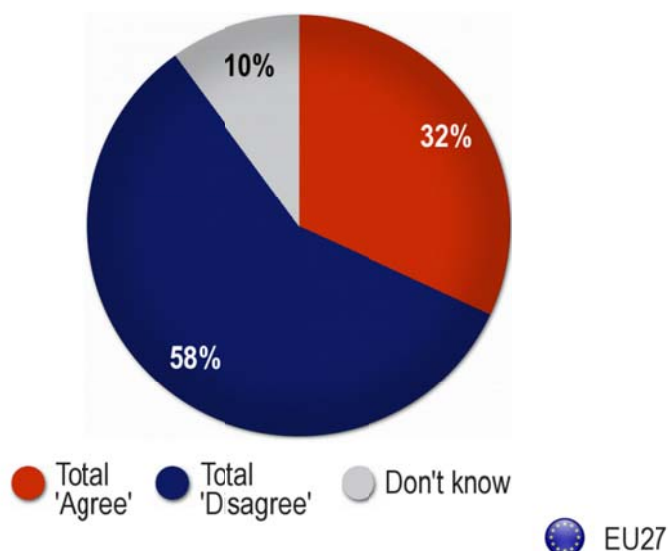
1.3. How to face the future?

– An absolute majority of Europeans do not think that it would be easier for their country to face the future outside the EU –

58% of Europeans disagree that their country “could better face the future outside the EU”, while just under a third of respondents (32%) agree with this statement and 10% expressed no opinion²⁴.

QA20a.11. Please tell me to what extent you agree or disagree with each of the following statements.

(OUR COUNTRY) could better face the future outside the EU



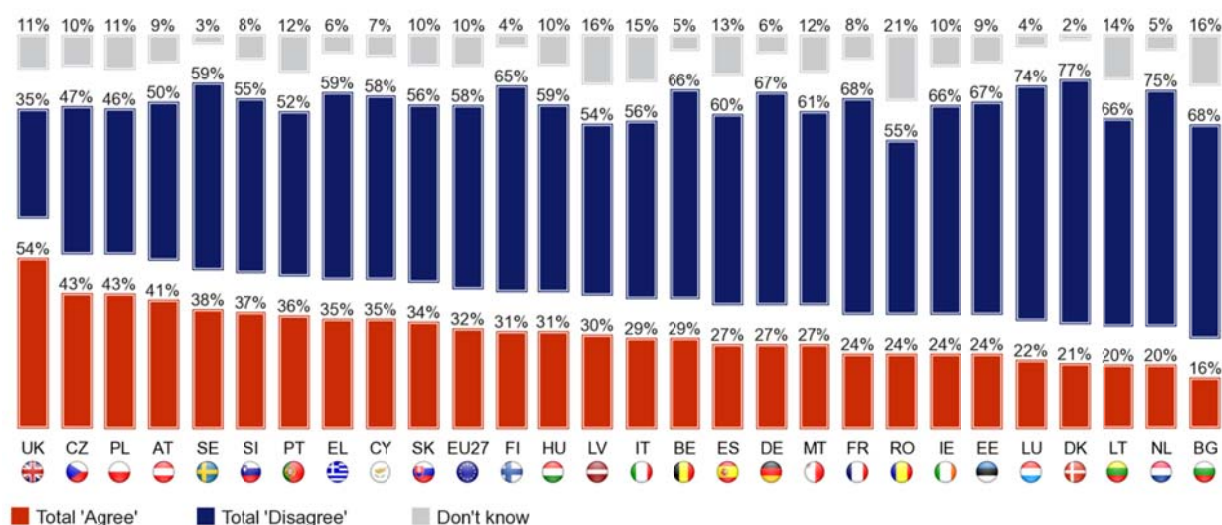
Although a majority of respondents in all groups of countries consider that their country's future would be better inside the EU than alone, this opinion is more widely held within the euro area (63% versus 28%) and the EU15 countries (59% versus 32%) than outside the euro area (47% versus 41%) and in the NMS12 (52% versus 34%).

A national analysis reveals that, with the sole exception of the United Kingdom, where an absolute majority of respondents (54%) say that their country would fare better outside the EU, a majority of respondents in all the Member States agree that European membership is preferable in order to face the future challenges. An absolute majority of respondents do so in 24 of the 27 EU countries, led by Denmark (77%), the Netherlands (75%), Luxembourg (74%), Bulgaria (68%), France (68%), Estonia (67%) and Germany (67%). The ratio of opinions is significantly narrower than the European average in the Czech Republic (47% disagree versus 43%) and Poland (46% versus 43%).

²⁴ QA20a.11 Please tell me to what extent you agree or disagree with each of the following statements. (OUR COUNTRY) could better face the future outside the EU.

QA20a.11. Please tell me to what extent you agree or disagree with each of the following statements.

(OUR COUNTRY) could better face the future outside the EU



Finally, a socio-demographic analysis reveals a broad consensus on this question among all categories of the European population. Irrespective of their age, level of education, socio-professional category or financial situation, a majority of respondents do not believe that their country would be better placed to face the future outside the European Union.

QA20a.11 Please tell me to what extent you agree or disagree with each of the following statements.














(OUR COUNTRY) could better face the future outside the EU

	Total 'Agree'	Total 'Disagree'	DK
EU27	32%	58%	10%
Sex			
Men	32%	60%	8%
Women	33%	55%	12%
Age			
15-24	30%	59%	11%
25-39	32%	58%	10%
40-54	33%	58%	9%
55 +	32%	56%	12%
Education (End of)			
15-	37%	48%	15%
16-19	35%	54%	11%
20+	27%	67%	6%
Still studying	25%	66%	9%
Socio-professional category			
Self-employed	29%	62%	9%
Managers	27%	67%	6%
Other white collars	32%	60%	8%
Manual workers	36%	54%	10%
House persons	34%	52%	14%
Unemployed	35%	51%	14%
Retired	34%	55%	11%
Students	25%	66%	9%

The table below also shows the socio-demographic results for the six largest EU countries, and for three countries which have been particularly badly affected by the economic and financial crisis.

QA20a.11 Please tell me to what extent you agree or disagree with each of the following statements.
(OUR COUNTRY) could better face the future outside the EU

Answer - Total 'Agree'

	DE 	ES 	FR 	IT 	PL 	UK 	EL 	PT 	IE 
 Sex									
Men	29%	25%	21%	28%	45%	55%	35%	35%	23%
Women	25%	28%	27%	29%	40%	53%	35%	38%	25%
 Age									
15-24	24%	28%	16%	26%	46%	45%	31%	37%	16%
25-39	30%	23%	26%	27%	43%	52%	36%	34%	27%
40-54	27%	27%	27%	31%	44%	56%	35%	38%	25%
55 +	26%	28%	25%	29%	39%	58%	36%	36%	23%
 Education (end of)									
15-	33%	34%	30%	28%	48%	64%	38%	36%	36%
16-19	31%	24%	25%	29%	40%	58%	35%	36%	24%
20+	18%	19%	20%	34%	42%	41%	35%	33%	22%
Students	22%	27%	10%	22%	45%	39%	27%	38%	14%
 Socio-professional category									
Self-employed	19%	17%	27%	27%	38%	54%	30%	20%	26%
Managers	17%	12%	14%	31%	51%	48%	50%	27%	17%
Other white collars	26%	20%	24%	34%	48%	46%	40%	37%	25%
Manual workers	31%	29%	30%	26%	41%	56%	38%	38%	29%
House persons	27%	27%	41%	26%	43%	64%	38%	37%	23%
Unemployed	50%	31%	30%	29%	43%	45%	42%	39%	24%
Retired	28%	28%	23%	31%	39%	62%	31%	36%	29%
Students	22%	27%	10%	22%	45%	39%	27%	38%	14%

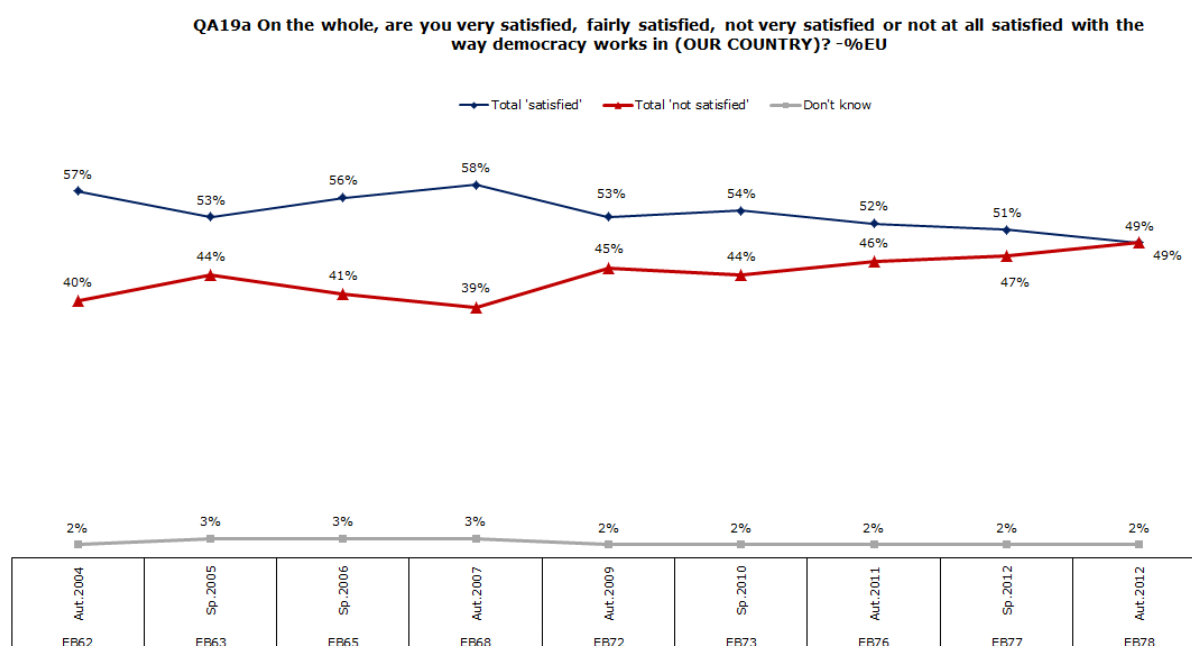
2. DEMOCRACY IN THE EU

– Satisfaction with the way that democracy works, nationally and in the European Union, continues to decline –

2.1. The perception of how national democracies and European democracy work

The way national democracy works

The downward trend in positive judgements of the way that national democracies work continues in this survey. 49% of Europeans (-2 percentage points since spring 2012) now say that they are satisfied with the way democracy works in their country while 49% (+2) are not satisfied, 2% (no change) expressing no opinion²⁵. For the first time since autumn 2004, less than half of Europeans express satisfaction with their country's democratic system. The hitherto favourable ratio of opinions is now evenly balanced.



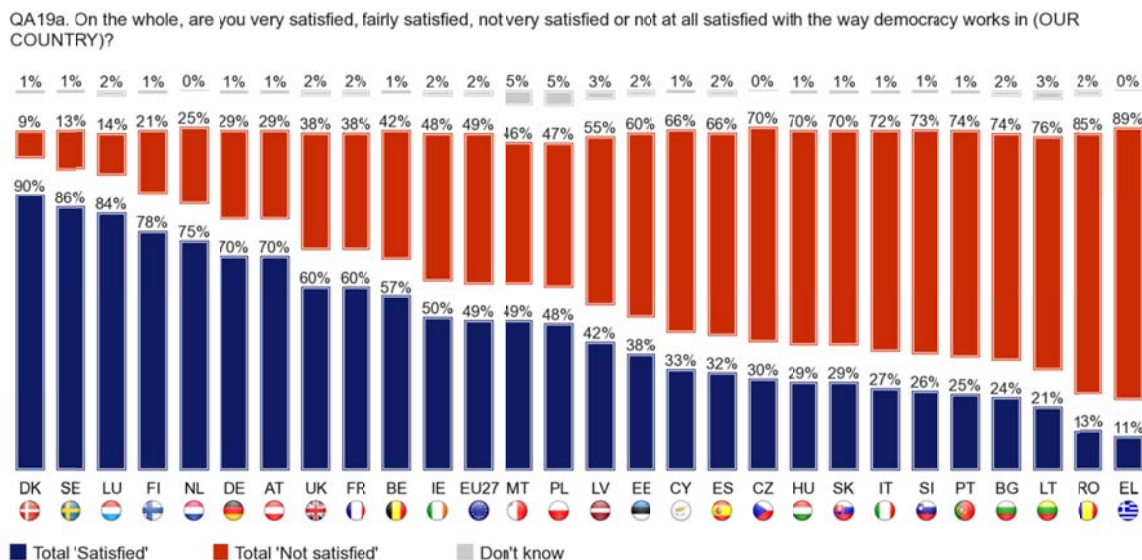
As was the case in previous surveys, there is a persistent gap between the EU15 countries which are predominantly satisfied with the way that national democracy works (53% compared with 46%) and NMS12 countries where dissatisfaction is widespread (64% "not satisfied" answers in total, compared with 33%). Satisfaction fell by two percentage points within the EU15 countries; dissatisfaction rose two percentage points within NMS12 countries.

²⁵ QA19a. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in (our country)?

However, the key finding of this survey is to be found in the evolutions measured within the euro area countries and the countries outside the euro area. Here the opinion ratio is reversed due to an erosion of satisfaction and an increase in dissatisfaction. There is thus a shift from a 52%/47% ratio in spring 2012 to 49%/50% today within the euro area, and from a 49%/47% ratio to 48%/50% in non-euro area countries.

Judgements of how well national democratic systems work differ widely from one country to another. Satisfaction is dominant in 13 of the 27 EU countries. As in the previous surveys, this satisfaction is highest in the Nordic countries (90% in Denmark, 86% in Sweden and 84% in Finland), Luxembourg (84%), the Netherlands (78%), Germany (75%), and Austria (both 70%). In contrast, dissatisfaction prevails in 14 Member States, with record highs in Greece (89%), Romania (85%), Lithuania (76%), Bulgaria (74%), Portugal (74%), Slovenia (73%), Italy (72%), and the Czech Republic, Hungary and Slovakia (all 70%).

The decline in satisfaction in this survey is particularly pronounced in Belgium (-11 percentage points), Cyprus (-8), Romania and France (both -7) and Estonia (-6).

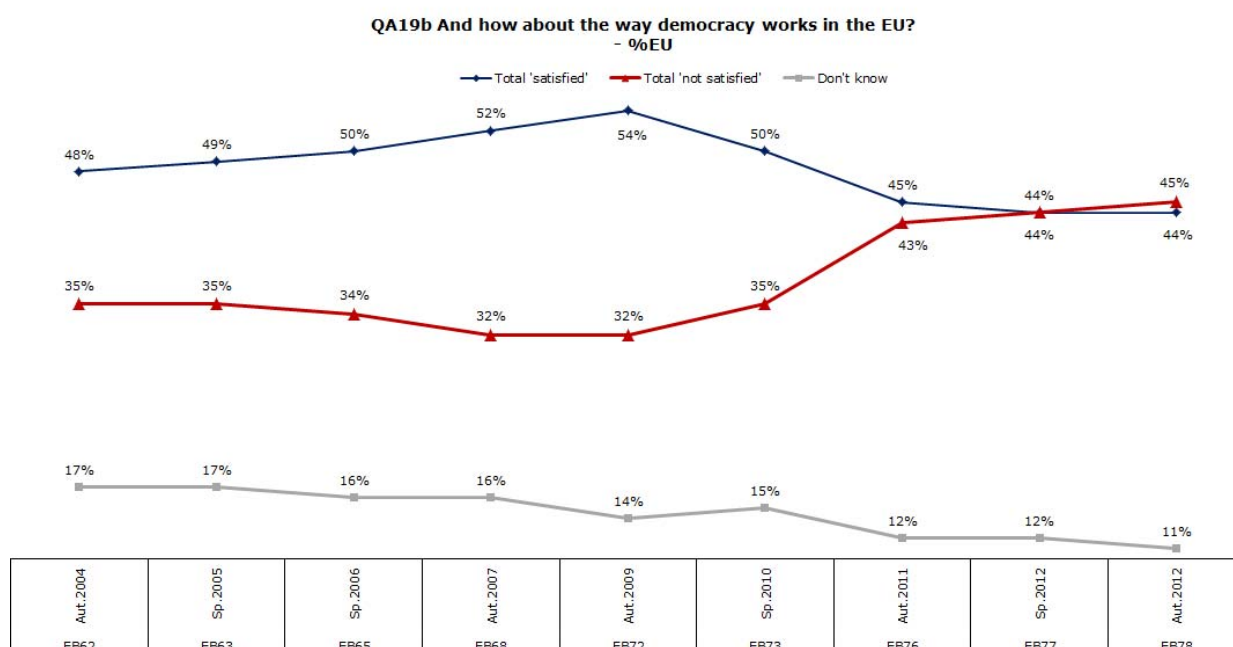


Structurally, the assessment of national democracy is highly dependent on the socio-economic conditions of respondents. Educated individuals, belonging to the higher and wealthier segments of society, tend to be positive, while people from low-income categories who are experiencing financial difficulties are harsher in their judgements of their democratic system.

The way European democracy works

44% of Europeans (unchanged from spring 2012) express satisfaction with the way democracy works in the EU, while 45% (+1 percentage point) say they are not satisfied, and 11% (-1) express no opinion²⁶.

Although the changes are slight in comparison to the previous survey, the ratio of opinions nevertheless has reversed on this indicator for the first time in the history of the Eurobarometer. Although it has weakened since the autumn 2011 Standard Eurobarometer (EB76) survey, there is nevertheless an underlying trend towards worsening judgements of the way European democracy works. Over a three-year period - taking the autumn 2009 survey (EB72) as a benchmark - positive judgements have fallen 10 points, while over the same time negative opinions have gained 13 points. Furthermore, in autumn 2009, Europeans felt that democracy worked better in the EU than in their own country. This is no longer the case today.



The way that European democracy works is considered satisfactory by an absolute majority of respondents within NMS12 countries (54% "total satisfied", versus 33%) and by a relative majority of respondents in countries outside the euro area (48% versus 39%). In contrast, a relative majority of respondents in the EU15 countries (48% "total not satisfied", compared with 42%) and euro area countries (48% compared with 43%) are not satisfied with how democracy works within the EU. The opinion ratios remain broadly unchanged since the previous survey in spring 2012 in these four groups of countries.

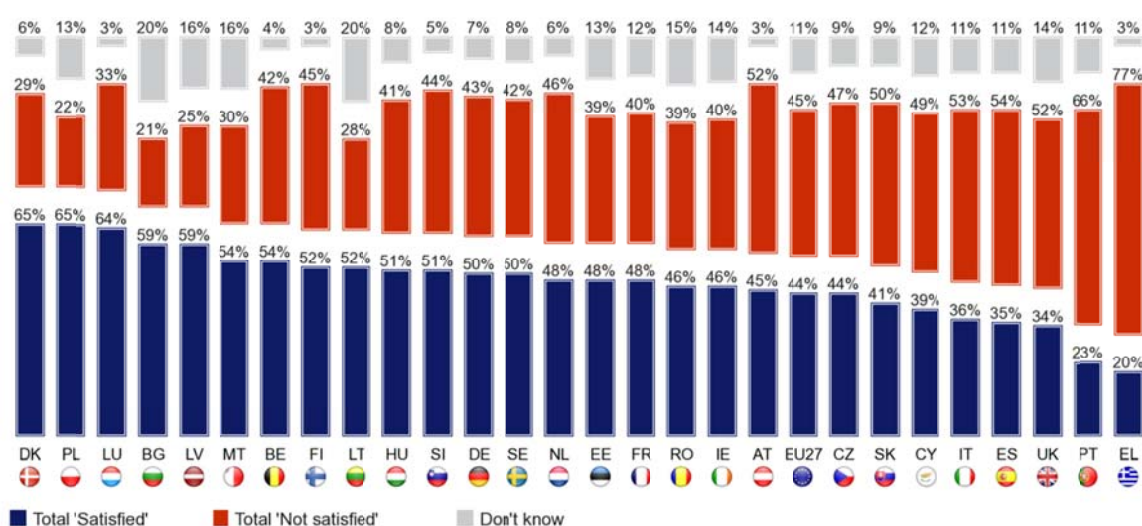
A national analysis shows that despite the very slight deterioration observed at the European level, an absolute or relative majority of respondents are satisfied in 18 EU

²⁶ QA19b. And how about the way democracy works in the EU?

Member States, whereas this was the case in 16 countries in spring 2012. Germany (50% versus 43% now; 47% versus 47% in spring 2012), Hungary (51%/41% now; 45%/45% in spring 2012) and Sweden (50%/42% now; 45%/45% in spring 2012) have re-joined the group of countries with a majority of satisfied respondents in this survey, while Cyprus has left this group (39%/49% now; 45%/44% in spring 2012). Within this "satisfied" group, the highest rates are recorded in Denmark (65% "total satisfied"), Poland (65%), Luxembourg (64%), Latvia (59%) and Bulgaria (59%). Countries in this group record some contrasting evolutions: satisfaction has gained ground significantly in Poland (+7 percentage points) and Bulgaria (+5), while the opinion ratio has deteriorated sharply in the Netherlands, falling from 52%/39% in spring 2012 to 48%/46% today, and in Belgium, from 63%/34% to 54%/46%.

Dissatisfaction predominates in nine countries, in Greece (77% +7 percentage points), Portugal (66% unchanged), Spain (54% +2), Italy (53% -4), the United Kingdom (52% +6), Austria (52% -2), Slovakia (50% +2), Cyprus (49% +5, versus 39% who are satisfied) and the Czech Republic (47% +3, versus 44%).





QA19b. And how about the way democracy works in the EU?



Opinions about how well European democracy works are primarily determined by an individual's age and social attributes. Judgements are mostly favourable among 15-24 year-olds (52%), students (56%), people with a high level of education (51%) and managers (53%). However, respondents are more likely to be dissatisfied if they are aged 55 and over (46% versus 41%), left school before the age of 16 (52%), are unemployed (52%) or have difficulty paying their bills most of the time (58%). Views on how democracy works in the European Union are also correlated with knowledge of the EU and the perception that people have of their influence as a citizen within the EU.

A majority of respondents who have good objective knowledge of the EU (52%) and, in particular, of those who believe that their voice counts in the EU (70%), express satisfaction, while those whose knowledge is poor (43% versus 26%) and those who believe that their vote does not count (57%) are more likely to be dissatisfied.

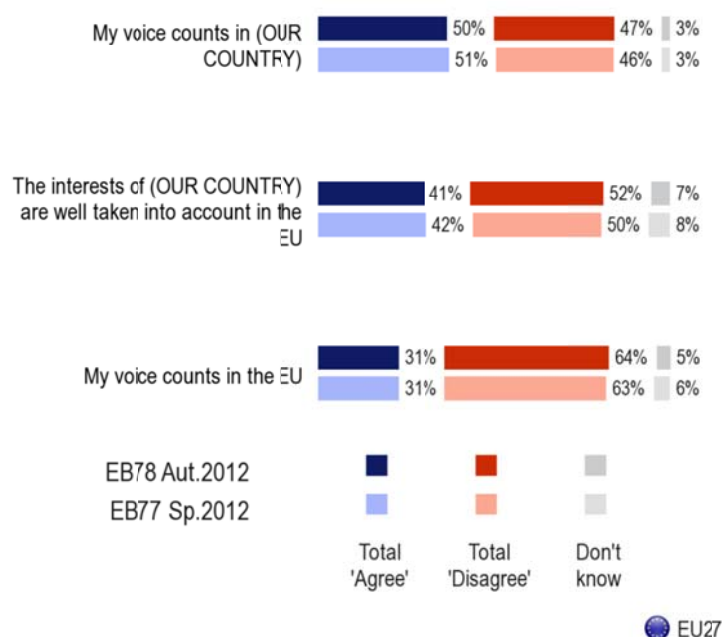
QA19 On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in ... ?

	(OUR COUNTRY)		the EU	
	Total 'Satisfied'	Total 'Not satisfied'	Total 'Satisfied'	Total 'Not satisfied'
EU27	49%	49%	44%	45%
 Gender				
Male	50%	49%	47%	45%
Female	48%	50%	43%	45%
 Age				
15-24	51%	47%	52%	38%
25-39	47%	51%	46%	45%
40-54	48%	51%	43%	48%
55 +	50%	48%	41%	46%
 Education (End of)				
15-	39%	59%	32%	52%
16-19	46%	53%	44%	45%
20+	59%	40%	51%	43%
Still studying	55%	42%	56%	34%
 Socio-professional category				
Self-employed	46%	53%	45%	47%
Managers	66%	34%	53%	42%
Other white collars	52%	47%	50%	43%
Manual workers	45%	53%	42%	47%
House persons	45%	52%	43%	45%
Unemployed	34%	64%	36%	52%
Retired	49%	49%	40%	46%
Students	55%	42%	56%	34%
My voice counts in the EU				
Agree	71%	28%	70%	24%
Disagree	38%	61%	33%	57%
Objective knowledge of the EU				
Bad	35%	57%	26%	43%
Average	49%	50%	43%	47%
Good	53%	46%	52%	43%

2.2. Are personal, national and European interests properly taken into account by the European Union?

The difference between satisfaction with how well national democracy works (49%) and satisfaction with European democracy (44%) can be explained in part by the perception that European citizens have of their influence. Thus, **a narrow majority of Europeans feel that "their voice counts in their country"**, while a large majority feel that their vote does not count in the EU. These two indicators have only been subject to minor changes since the previous Standard Eurobarometer of spring 2012.

QA20a. Please tell me to what extent you agree or disagree with each of the following statements.



Half of Europeans (50% -1 percentage point since the EB77 survey in spring 2012) believe that their voice counts in their country, while 47% (+1) believe that the opposite is true²⁷. The belief that one's voice as a citizen counts at the national level is expressed by a majority within the EU15 countries (54% versus 44%) and within euro area countries (53% versus 45%), while the belief that one's voice is not heard is expressed by a majority outside the euro area (50% versus 47%), and even more widely within NMS12 countries (57% versus 39%). Since spring 2012, the belief that "my voice counts in my country" has gained ground significantly in Portugal (+11) and Bulgaria (+10), though this is still the minority view; in contrast, it has declined sharply in Cyprus (-13) and Greece (-10).

²⁷ QA20a.5 Please tell me to what extent you agree or disagree with each of the following statements. My voice counts in (OUR COUNTRY).

64% (+1 percentage point) of Europeans believe that "their voice does not count in the European Union", while 31% (unchanged) believe the opposite is true²⁸.

This view is shared in similar proportions in the EU15 and NMS12 countries, whether or not they are members of the euro area.

In this survey, the opinion ratio has reversed to positive effect in Malta (46% versus 43% now; 41% versus 45% in spring 2012), which is now, along with Denmark (55% compared with 41%), one of the only two countries where a majority of citizens feel that their voice counts in the EU. However, the ratio has reversed in a negative manner in the Netherlands (45% versus 51% now; 50% versus 46% in the Eurobarometer EB77 survey), thus confirming the sharp deterioration in judgements within this country about how well democracy works in Europe.

In this survey, the belief that one's voice counts in the EU has gained most ground in Bulgaria (+10 percentage points), Hungary (+8), and Austria and Ireland (both +6). It has declined most in France (-6), and Estonia, Belgium, the Netherlands and Greece (all -5).

Since the spring 2012 survey, the ratio of opinions regarding whether the EU takes account of national interests has deteriorated slightly. The percentage of respondents who consider that their country's interests are taken into account by the EU is down by one percentage point, while the proportion who take the opposite view has seen a 2-point rise. **The impression that national interests are not properly taken into account thus continues to dominate European opinion (52% versus 41%)**²⁹.

Regardless of the group of countries considered, this point is illustrated by the fact that an absolute majority of respondents agree that national interests are poorly taken into account by the EU. This is the case for 55% (-1 percentage point) of respondents in countries outside the euro area, 54% (unchanged) in NMS12 countries, 51% (+2) in EU15 countries and 50% (+3) of euro area respondents.

Since the Standard Eurobarometer of spring 2012, the opinion ratio has now reversed negatively manner in the Netherlands: 47% of respondents (versus 46%) now feel that their country's interests are inadequately taken into consideration by the EU, while 51% (versus 43%) were of the opposite opinion in spring 2012. The ratio has reversed in a positive direction in Poland (50% versus 40% now; 43% versus 45% in spring 2012). Poland thus joins the group of eight countries where respondents are more likely to believe that the EU does take account of national interests, alongside Luxembourg (69%), Germany (60%), Denmark (52%), Belgium (50%), Malta (49% versus 40%), France (49% versus 43%) and Sweden (49% versus 46%). Within this group, there is nevertheless a sharp downward trend in Belgium (the belief that the EU takes proper account of national interests has declined by 11 points since spring 2012) and in France (-8).

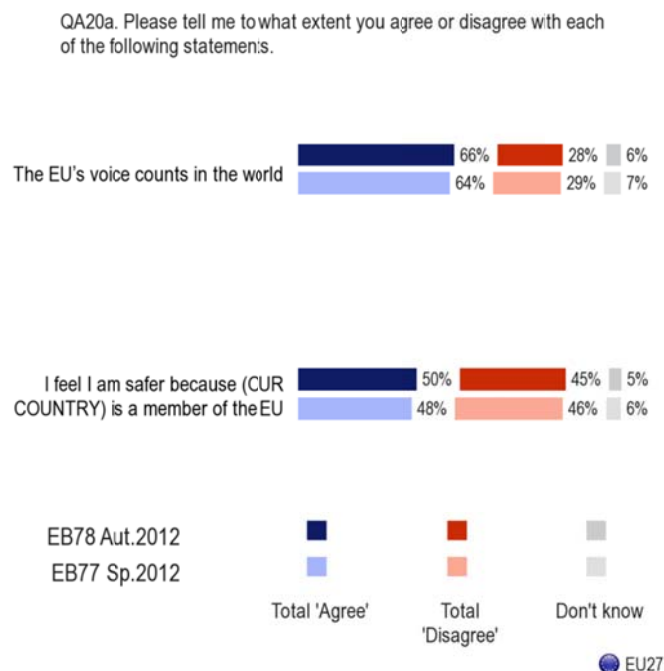
²⁸ QA20a.4 Please tell me to what extent you agree or disagree with each of the following statements. My voice counts in the EU.

²⁹ QA20a.2 Please tell me to what extent you agree or disagree with each of the following statements. The interests of (OUR COUNTRY) are well taken into account in the EU.

The perception that the EU does not take proper account of national interests is dominant everywhere else, and with the exception of Hungary (64% -4 percentage points), it has gained ground in the countries where it was already most pronounced. This is the case in Greece (88% +4), the Czech Republic (71% +7), Cyprus (70% +3), Romania (66% +9) and Portugal (63% +7).

Public opinion continues to believe that the EU is an important actor internationally. Two-thirds of Europeans (66% +2 percentage points since spring 2012) agree that "the EU's voice counts in the world", while only 28% (-1) disagree and 6% (-1) express no opinion³⁰.

Recognised as a global player, the EU is also seen - to a slightly greater extent than in spring 2012 - as a safe environment for its members. 50% (+2) of Europeans feel safer because their country belongs to the EU, while 45% (-1) disagree and 5% (-1) express no opinion³¹.



The feeling of safety has gained significant ground within the EU15 countries, thereby reversing the opinion ratio of spring 2012: 49% versus 46% now; 46% versus 48% in the Eurobarometer EB77 survey. This remains more pronounced in NMS12 countries (57%, +1). It is almost identical in countries within the euro area (50% versus 45%) and outside it (49% versus 45%).

The belief that European membership is a source of security for its members has fallen sharply in Belgium (47% -6 percentage points) and Greece (42% -14), where it is now the minority opinion. It has grown in the Netherlands, once again becoming the majority opinion (50% +4). It has also gained ground significantly in Hungary (+7), and Bulgaria, Germany and Italy (all +6).

³⁰ QA20a.6 Please tell me to what extent you agree or disagree with each of the following statements. The EU's voice counts in the world.

³¹ QA20a.3 Please tell me to what extent you agree or disagree with each of the following statements. I feel I am safer because (OUR COUNTRY) is a member of the EU.

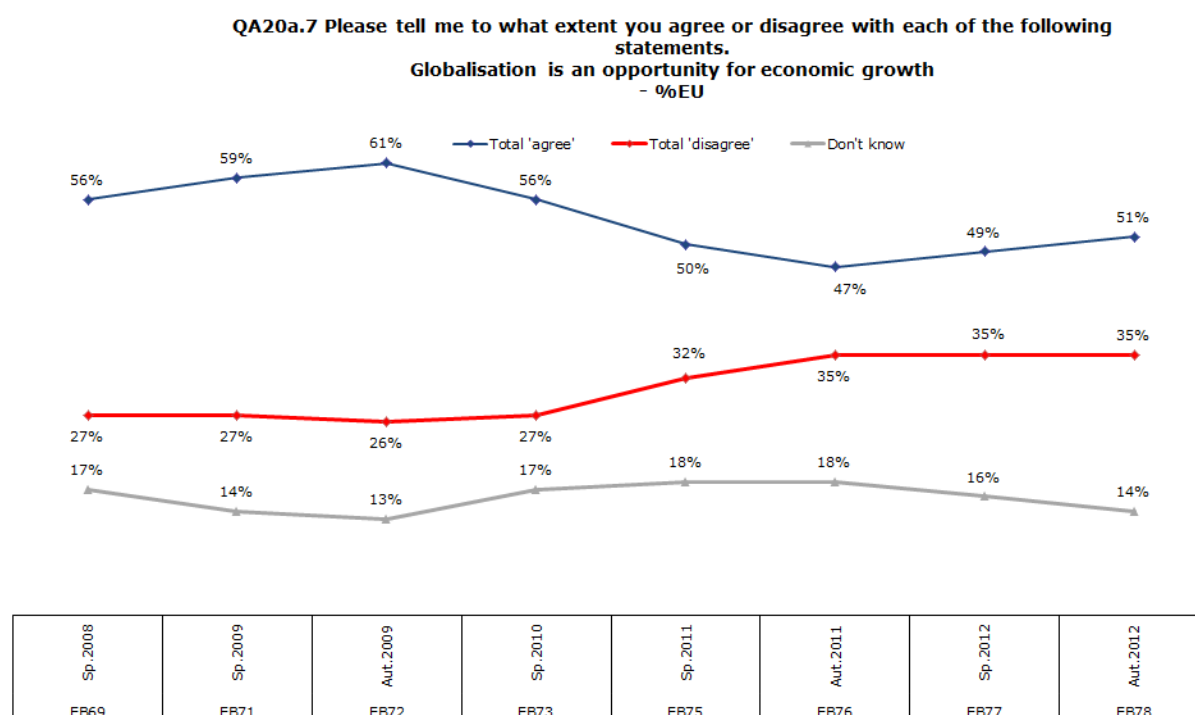
3. EUROPEANS AND GLOBALISATION

- Over half of Europeans believe that globalisation is an opportunity for growth; two-thirds believe that their country cannot cope with the negative effects of globalisation alone –

3.1. Globalisation: an opportunity for economic growth?

Over half of Europeans (51%) see globalisation as an opportunity for economic growth. In contrast, a little over a third (35%) do not do so, while 14% have no opinion³².

There has been a slight increase in positive representations of globalisation, which are up by two percentage points since the spring 2012 survey (EB77) and four points since autumn 2011 (EB76). Meanwhile, negative perceptions remain unchanged. The trend is thus towards an improving image of globalisation among Europeans, although it has not returned to the level of support it enjoyed in spring 2010, in the Eurobarometer EB73 survey. The positive opinion differential on globalisation is now +16 compared with +14 in spring 2012, and +12 in autumn 2011, but still far from the +29 of spring 2010.



³² QA20a.7 To what extent do you agree or disagree with each of the following statements? Globalisation is an opportunity for economic growth.

Globalisation is predominantly seen as an opportunity for economic growth in 19 Member States. As in previous surveys, the highest levels are recorded in the Nordic countries (79% in Denmark, 77% in Sweden and 70% in Finland), the Netherlands (74%) and Germany (67%). In this predominantly positive group, opinions of globalisation have improved sharply in Ireland (62% +7 percentage points), Poland (55% +8) and Hungary (55% +7).

The opinion ratio has deteriorated in three countries: Belgium, where it is now evenly balanced (48% versus 48%), whereas it was positive in spring 2012 (54% versus 41%); Portugal (35% versus 44% now; 39% versus 37% in spring 2012); and Romania (29% versus 37% now; 35% versus 33% in spring 2012) where it has reversed.

The negative perception of the economic role of globalisation has gained ground or remains unchanged in countries where it was already dominant in spring 2012: Greece (71% +9 points), Cyprus (61% +8), Italy (51% unchanged) and the Czech Republic (49% +5, versus 40%). Lastly, opinion is evenly divided in France (46% unchanged, versus 45%).

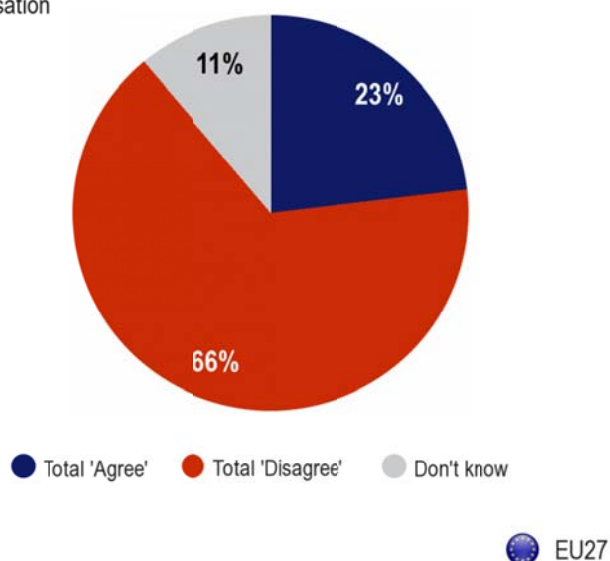
The socio-demographic analysis reveals significant divisions between categories, as was the case in previous Eurobarometer surveys: the young, the most highly educated and the most affluent classes of society are more likely to see the economic dimension of globalisation in a positive light than older generations, the least educated and those on low-incomes who encounter financial difficulties. For example, one-third of people who have trouble paying their bills have a positive image of globalisation compared with 57% of those who almost never have such difficulties.

3.2. The EU and the effects of globalisation

Two-thirds of Europeans do not agree with that "their country alone can cope with the negative effects of globalisation". Only 23% endorse this argument, while 11% express no opinion³³.

QA20a.8. Please tell me to what extent you agree or disagree with each of the following statements.

(OUR COUNTRY) alone can cope with the negative effects of globalisation

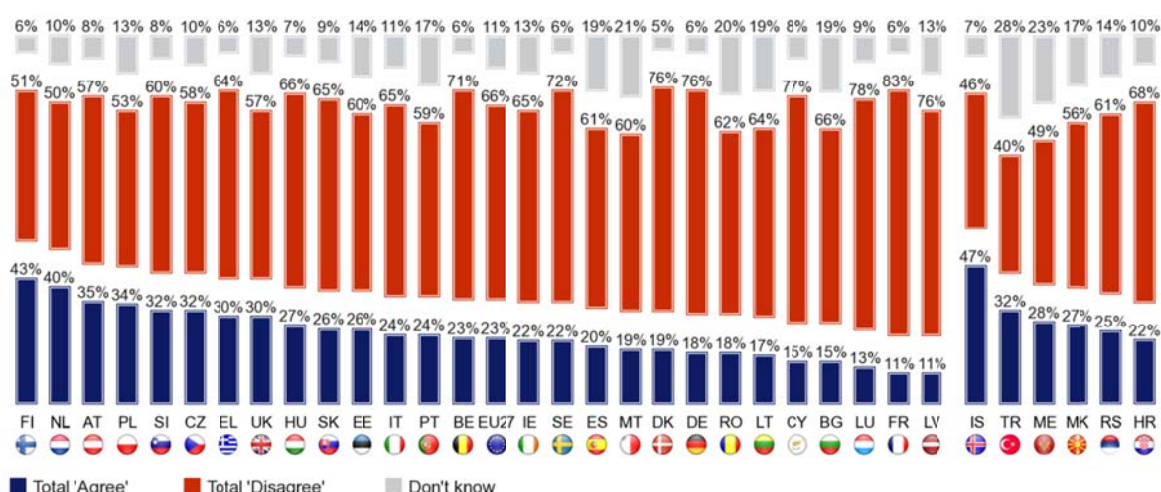


This is another instance of the finding already mentioned above: Europeans remain convinced of the value of and the need to work together, for example within the EU. This is confirmed by the national analysis: in every European Union country, a majority of respondents do not believe that their country could face the negative effects of globalisation on its own. The opinion ratio ranges from 83%/11% in France to 50%/40% in the Netherlands.

³³ QA20a.8 To what extent do you agree or disagree with each of the following statements? (OUR COUNTRY) alone can cope with the negative effects of globalisation.

QA20a.8. Please tell me to what extent you agree or disagree with each of the following statements.

(OUR COUNTRY) alone can cope with the negative effects of globalisation



Within the candidate countries, the view that the country can cope with the negative effects of globalisation on its own commands the smallest of majorities in Iceland (47% versus 46%). All the other countries take the opposite view, with levels ranging from 40% in Turkey (versus 32% of "total agree") to 68% in Croatia (versus 22%).

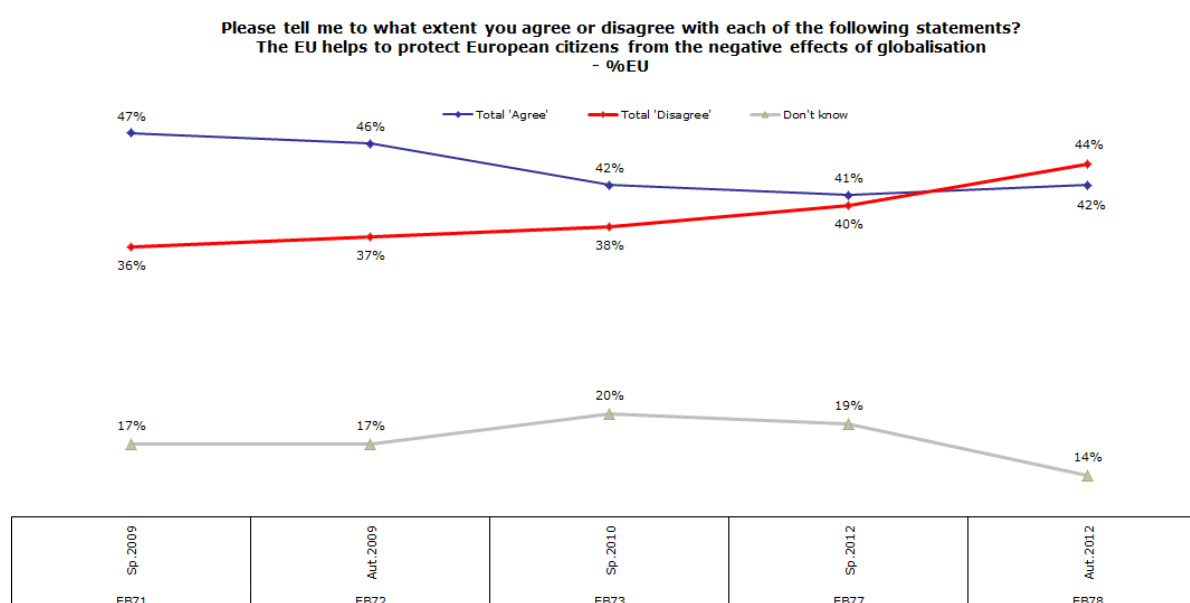
For a more accurate understanding of Europeans' representations of the EU's role in terms of globalisation, the sample was divided into two parts. The first half was asked to express itself regarding a negative description of globalisation: "the EU helps to *protect* European citizens from the *negative* effects of globalisation". The second half was asked to respond to a positive description of globalisation: "the EU enables European citizens to better *benefit* from the *positive* effects of globalisation".

Whether the statement is worded positively or negatively, acknowledgement of the EU's role in globalisation is clearly much lower than support for the statement that a country cannot cope with globalisation on its own today. Since spring 2009, the perception that the European Union gives protection against the negative effects of globalisation has lost ground in public opinion. In this survey, the percentage of Europeans who say that the EU does not play a protective role against globalisation is for the first time greater than the proportion who believe the EU does fulfil this role. There is also a downward trend in perceptions of the EU as a lever enabling people to benefit from the positive effects of globalisation, although the opinion ratio for this indicator remains generally favourable.

The negative wording (SPLIT A)

Over four in ten Europeans (44%) now believe that the EU does not help European citizens protect themselves from the negative effects of globalisation. This proportion is up four points from spring 2012 and for the first time exceeds the proportion of Europeans who accept the European Union's protective role (42% +1 percentage point)³⁴.

Since 2009, the opinion ratio for this indicator has steadily deteriorated. The differential between positive and negative opinions has fallen from +11 in the spring 2009 Eurobarometer survey (EB71) to +4 in spring 2010 (EB73), +1 in spring 2012 (EB77), and -2 today. The image of the EU as a protective force against the negative effects of globalisation is thus slowly eroding.































The EU's protective role is acknowledged most by respondents within NMS12 countries (46% "total agree" versus 38%) and countries outside the euro area (44% versus 39%). However, it is generally denied by respondents in the EU15 countries (45% "total disagree" versus 41%) and within the euro area (46% versus 41%).

The opinion ratio is now evenly balanced in Belgium (47% versus 47%), though it was significantly positive in spring 2012 (52% versus 40%). Under the influence of increases of 17 and 9 percentage points respectively in negative perceptions, the opinion ratio has deteriorated in the Czech Republic (31% versus 59% now; 42% versus 42% in spring 2012) and Romania (36% versus 40% now; 31% versus 31% in 2012). In contrast, this ratio is now positive in Hungary (49% versus 41% now; 45% versus 46% in spring 2012) and Luxembourg (41% versus 40% now; 43% versus 43% in 2012).

³⁴ QA20a.9. Split A. To what extent do you agree or disagree with each of the following statements? The EU helps to protect European citizens from the negative effects of globalisation.

Overall, the EU is seen as a protective force in 16 EU Member States, and by an absolute majority of respondents in Denmark (63%), Poland (56%), Bulgaria (56%), Malta (55%), Sweden (52%), Finland (51%), and Ireland and the Netherlands (both 50%). This perception has gained significant ground in Bulgaria (+10 percentage points) and Poland (+8). The EU's role is therefore viewed most favourably in almost all the countries which we have previously identified as having a positive view of globalisation.

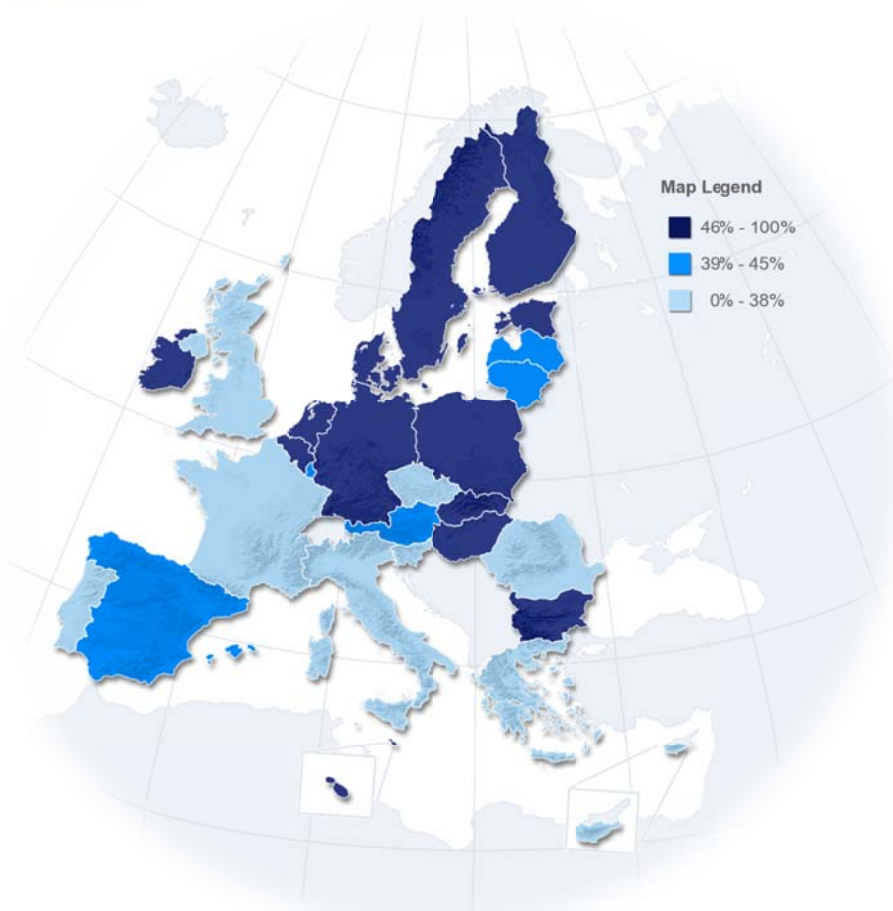
Representations of the EU as unable to provide protection predominate in 10 Member States, especially in Greece (68%), the Czech Republic (59%), Cyprus (57%), Slovenia (56%) and France and Italy (both 52%); and by narrower majorities in Austria (49% versus 44%), the UK (44% versus 37%), Portugal (43% versus 35%) and Romania (40% versus 36%). This portrayal is gaining ground in all of these countries, most strikingly in the Czech Republic (+17), Cyprus (+11), Greece and Romania (both +9), the United Kingdom (+8), and France and Slovenia (both +6).

	DK	63%
	PL	56%
	BG	56%
	MT	55%
	SE	52%
	FI	51%
	IE	50%
	NL	50%
	HU	49%
	EE	47%
	BE	47%
	DE	46%
	SK	46%
	AT	44%
	ES	44%
	LV	44%
	LT	43%
	EU	42%
	LU	41%
	UK	37%
	RO	36%
	FR	36%
	PT	35%
	SI	35%
	IT	35%
	CY	31%
	CZ	31%
	EL	28%

Question: QA20a.9. Please tell me to what extent you agree or disagree with each of the following statements

Option: The EU helps to protect European citizens from the negative effects of globalisation

Answers: Total 'Agree'

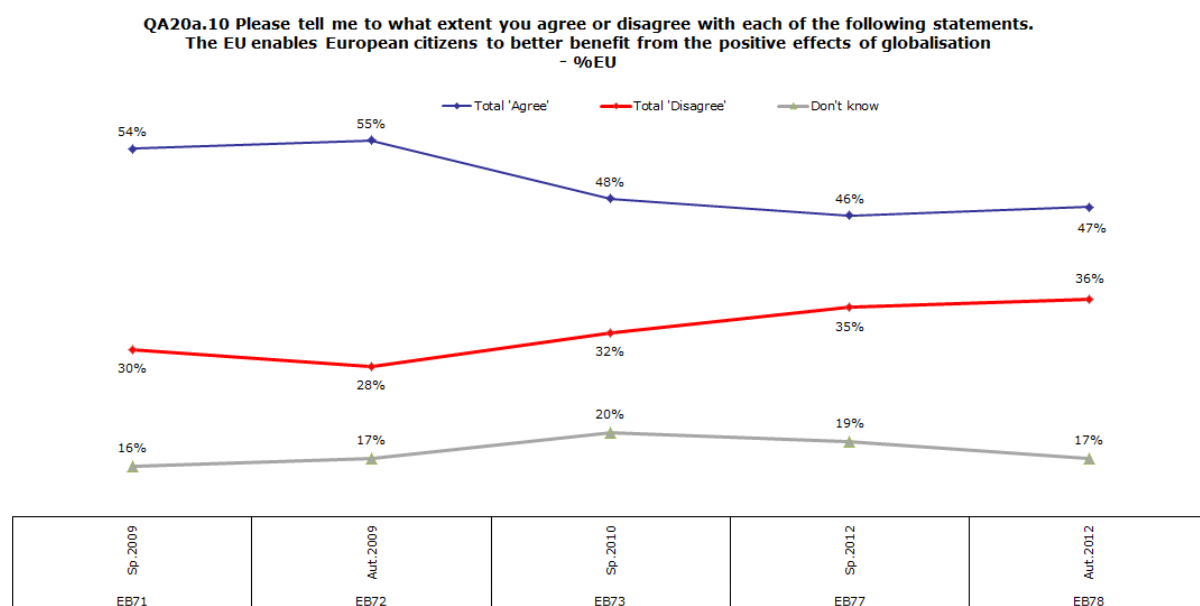


These views of the EU's role are subject to the same social determinants as views of globalisation. The European Union is perceived as protective by the younger generations and by educated individuals who are well integrated socially and economically. However, this view is not shared by a majority among the older generations and the poorer and insecure segments of the European population.

The positive wording (SPLIT B)

The representation of the European Union as a lever enabling people to benefit from the positive effects of globalisation receives more support than was measured for its protective role. 47% of Europeans agree that "the EU enables European citizens to better benefit from the positive effects of globalisation", while 36% express the opposite view, and 17% gave no answer³⁵.

Both positive and negative judgements have increased by one percentage point, so that the opinion ratio remains at the same level as in spring 2012. Although this ratio is still generally favourable, the underlying trend in recent years has been downward. The opinion differential is thus +11 today, compared with +16 in spring 2010 (EB73), +24 in spring 2009 (EB71) and +27 in autumn 2009 (EB72).



Compared to the Standard Eurobarometer survey of spring 2012, the opinion ratio has reversed to positive effect in France (48% versus 38% now; 41% versus 42% in spring 2012) and in Austria (45% versus 43% now; 45% versus 46% in 2012); once again, it has reversed negatively in Belgium (43% versus 48% now; 52% versus 41% in spring 2012) and also in Portugal (36% versus 45% now; 41% versus 35% in 2012).

³⁵ QA20a.10. Split B. To what extent do you agree or disagree with each of the following statements? The EU enables European citizens to better benefit from the positive effects of globalisation.

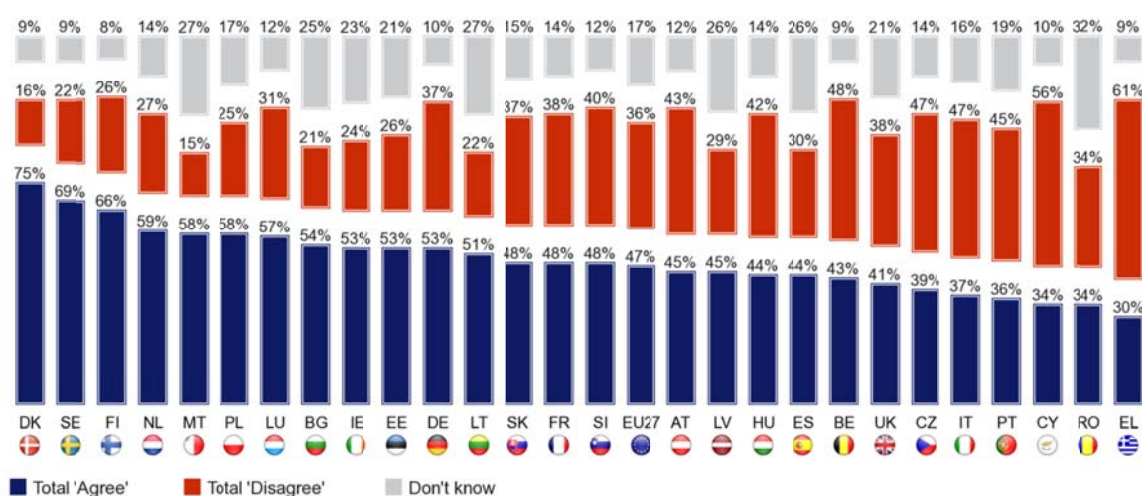
France thus joins the group of Member States which agree that the EU enables people to benefit from globalisation. The highest levels of agreement are recorded in Denmark (75%), Sweden (69%), Finland (66%), the Netherlands (59%) and Malta and Poland (both 58%).

Within this group, this positive perception of the EU's role has gained significant ground in Bulgaria (+9 percentage points) and in France and Luxembourg (both +7).

Negative opinions dominate in six countries, Greece (61%), Cyprus (56%), Belgium (48% versus 43%), Italy (47% versus 37%), the Czech Republic (47% versus 39%) and Portugal (45% versus 36%). They are up sharply in Portugal (+10), Cyprus (+8) and Belgium (+7).

QA20a.10. Please tell me to what extent you agree or disagree with each of the following statements.

The EU enables European citizens to better benefit from the positive effects of globalisation

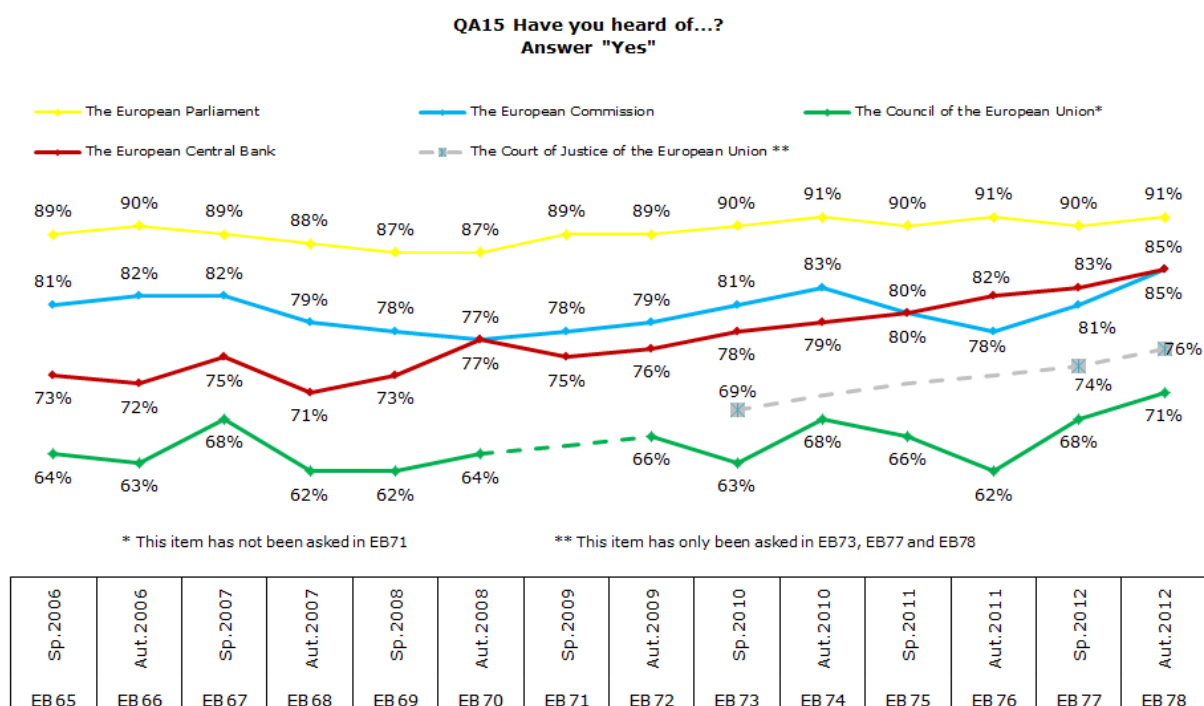


4. THE EUROPEAN INSTITUTIONS

– Awareness of the European institutions has reached an all-time high –

4.1. Awareness of European institutions and the trust they inspire

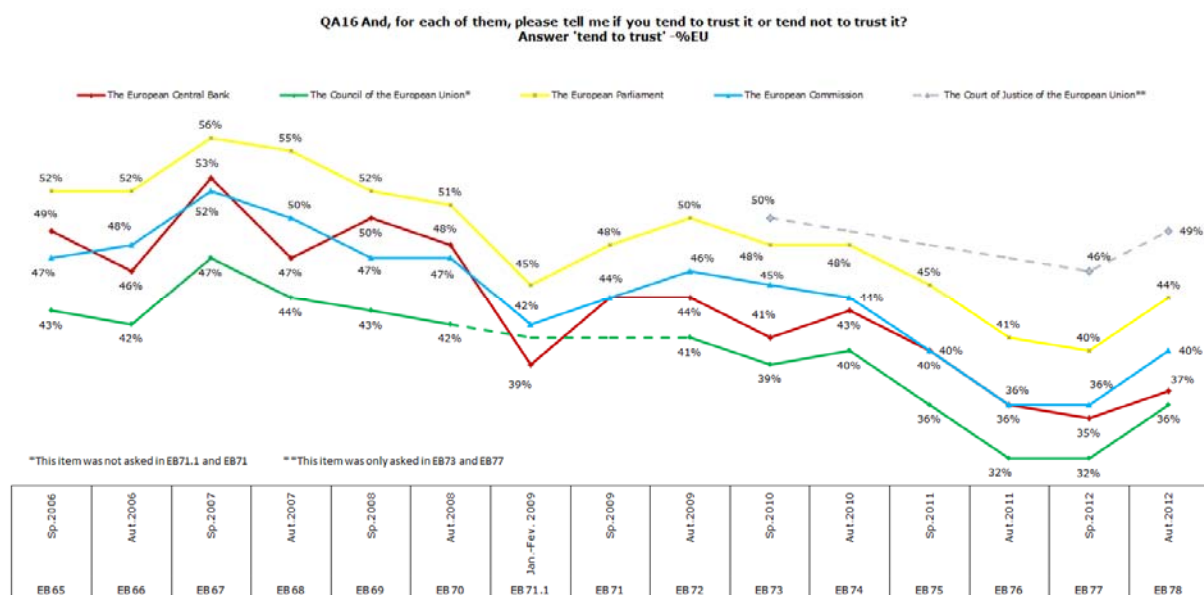
Awareness of the European Parliament has reached its highest level (91% +1 percentage point), maintaining its leading position as the best-known institution. Up four percentage points since spring 2012 (EB77) and seven since autumn 2011 (EB76), awareness of the European Commission stands at 85% a level never before achieved in the Eurobarometer. Since the spring 2009 survey (EB71), awareness of the Central Bank has grown steadily, gaining 10 points and reaching the current record of 85% (+2 since spring 2012). Awareness of the Council of the European Union, which now stands at 71% is up by three percentage points since spring 2012, and nine since autumn 2011; while the Court of Justice has gained two percentage points since spring 2012 and seven since spring 2010³⁶.



³⁶ QA15.1+2+3+4+5 Have you heard of...? The European Parliament/The European Commission/The European Central Bank/The Council of the European Union/The Court of Justice of the European Union

Since the Standard Eurobarometer survey of autumn 2010 (EB74), there had been a continued erosion of trust in the European institutions. This survey marks a break in that trend, with a significant rise in trust in all the European institutions that were tested. Although a renewal of trust seems to have been set in motion, these institutions are still far from regaining the trust they enjoyed before the crisis³⁷.

The previous survey had revealed a sharp decline in trust in southern European Union countries (Greece, Spain, Cyprus, Portugal and Italy), which had often been hit hard by the debt crisis. In this survey, trust remains at a very low level in Greece, Cyprus and Spain but has seen a very marked recovery in both Italy and Portugal. Although views in these countries had tended to evolve in step since 2009, they diverge for the first time in this survey.



³⁷ QA16.1+2+3+4 +5. For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it. The European Parliament; The European Commission; The Council of the European Union; The European Central Bank; The Court of Justice of the European Union.

The European Parliament

The index of trust in the European Parliament has improved in this survey³⁸. It stands at -1 compared with -6 in spring 2012 and -4 in autumn 2011. 44% of Europeans (+4 percentage points since spring 2012) trust the European Parliament while 45% (-1) tend not to trust it and 11% (-3) express no opinion. The trust index stands at +2 among respondents who have heard of the European Parliament (46% trust it, versus 42% who tend not to do so).

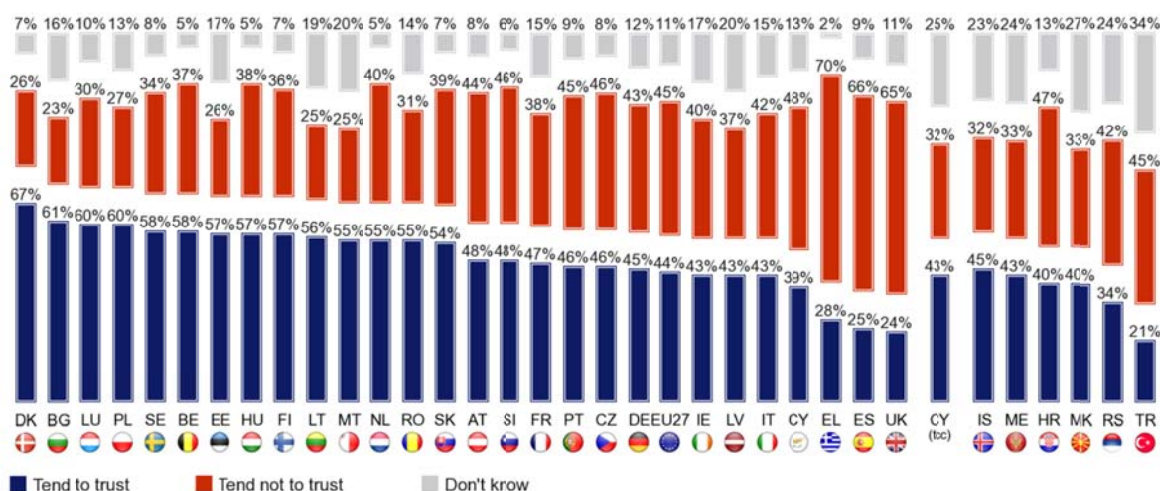
However, this index is very largely negative among respondents who have not previously heard of the European Parliament, standing at -35. These respondents have negative preconceptions regarding the European Parliament. This trend applies to all the European institutions tested in this survey.

In this survey, the trust index is positive once again in Italy (+1 versus -14 in spring 2012), Portugal (+1 versus -12), Ireland (+3 versus -10), Slovenia (2 versus -10) and Austria (+4 versus -6). Including these countries, trust is now higher than distrust in 22 Member States (Belgium, Bulgaria, Denmark, Germany, Estonia, Ireland, France, Italy, Latvia, Lithuania, Luxembourg, Hungary, Malta, the Netherlands, Austria, Poland, Portugal, Romania, Slovenia, Slovakia, Finland and Sweden) and is highest in Denmark (67%), Bulgaria (61%) and Luxembourg and Poland (both 60%). Within this group, trust has gained most ground in Poland (+11), Malta (+10), Portugal and Italy (both +8) and Ireland and Bulgaria (both +7).

The trust-distrust ratio is evenly balanced in the Czech Republic (46% versus 46%) whereas it was negative in spring 2012 (43% versus 47%).

Distrust is therefore only dominant in four countries, whereas this was the case in 10 in spring 2012: Greece (70%, unchanged), Spain (66%, +4), the United Kingdom (65%, unchanged) and Cyprus (48%, +5, versus 39%).

QA16.1. For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.
The European Parliament



³⁸ Difference between the "tend to trust it" and "tend not to trust it" percentages.

The European Commission

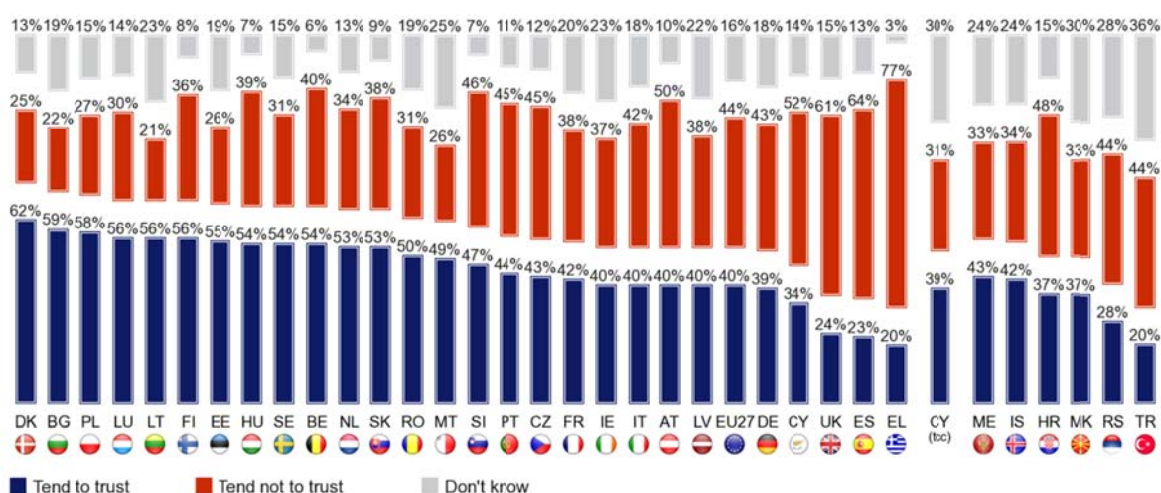
In the previous survey, the European Commission reached its lowest level of trust ever measured in the Eurobarometer. Although distrust remains dominant in this survey, the trust index has nevertheless recovered significantly. It stands at -4 today compared with -10 in spring 2012 (EB77) and -7 in autumn 2011 (EB76).

Four in ten Europeans (40% +4 percentage points) trust the European Commission while 44% (-2) do not trust it and 16% (-2) express no opinion. The trust index is just positive among respondents who have previously heard of the European Commission (+1); however, it is very negative among those who have not previously done so (-34).

The index of trust in the European Commission is very positive in the NMS12 countries (+21) and just above equilibrium in countries outside the euro area (+1). However, it is negative within the euro area (-6) and EU15 countries (-10). To varying degrees, these four groups of countries share the trend toward renewed trust, with a 7-point rise in the index in NMS12 countries and in countries outside the euro area, a 6-point rise in the EU15 countries and a 5-point rise within the euro area.

Since the EB77 survey in spring 2012, the trust index has return to positive territory in Ireland (+3 versus -10 in spring 2012), Latvia (+2 versus -1) and Slovenia (+1 versus -7). These evolutions mean that trust is now dominant in 18 EU Member States (Belgium, Bulgaria, Denmark, Estonia, France, Ireland, Latvia, Lithuania, Luxembourg, Hungary, Malta, the Netherlands, Poland, Romania, Slovakia, Slovenia, Finland and Sweden), compared with 15 in spring 2012. Within this group, the increase in trust is especially marked in Poland (+12 percentage points) and in Bulgaria and Lithuania (both +8 points).

QA16.2. For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.
The European Commission



Distrust remains dominant in nine countries (the Czech Republic, Germany, Greece, Italy, Cyprus, Austria, Portugal and the United Kingdom), with the highest scores in Greece (77%), Spain (64%), the United Kingdom (61%) and Cyprus (52%). Portugal and Italy's presence within this group should nevertheless not hide the strong revival of trust in the European Commission in these two Member States. Their trust indices have moved since spring 2012 from -16 to -2 in Italy and from -15 to -1 in Portugal.

The European Central Bank

Of all the institutions tested, the European Central Bank is the one that arouses the most distrust and where the upturn in trust is the most limited. Distrust of this institution thus remains largely dominant in European opinion.

Nearly half of Europeans (49% unchanged) do not trust the European Central Bank, while 37% (+2 percentage points) instead trust this institution. The trust index has gained only two points and stands at -12, compared with -14 in spring 2012 and -10 in autumn 2011. It stands at -9 among respondents who have previously heard of the European Central Bank, and at -35 among those who have not done so.

An absolute majority of respondents in the EU15 countries (53%) and in the euro area (52%) do not trust the European Central Bank, almost unchanged since the previous Eurobarometer survey. The trust-distrust ratio is close to equilibrium among countries outside the euro area (39% versus 43%) and is very positive in NMS12 countries (47% versus 34%).

Since the spring 2012 survey, the main evolution concerns Belgium's entry into the group of countries with a negative trust index; this now stands at -6 compared with +7 in spring 2012. The same is true of Latvia, at -2 compared with 0. These developments bring to 13 the number of EU countries where a majority distrust the European Central Bank (Belgium, Germany, Ireland, Greece, Spain, France, Italy, Cyprus, Latvia, Hungary, Portugal, Slovenia and the United Kingdom). This distrust is even expressed by an absolute majority of respondents in Greece (81%), Spain (75%), the UK (60%), Cyprus (53%), Germany (52%), Ireland and Slovenia (both 51%) and Belgium and Portugal (both 50%). Although the trend within this group is marked by either stability or a decline in the trust index, Italy and Portugal once again prove to be exceptions. The index has recovered dramatically in Italy, from -35 to -11, and falls from -18 to -13 in Portugal.

In countries where trust is predominant, it has gained most ground in Poland (+10) and Lithuania (+9).

The Council of the European Union

36% of Europeans (+4 percentage points) say they trust the Council of the European Union, while 43% (-1) instead distrust it. The proportion of respondents who have no opinion is down three percentage points but remains high, at 21%. The trust index remains negative at -7 but has risen by five percentage points since spring 2012. It is positive among those who have previously heard of the Council (+2), but stands at -27 among those who have never heard of it.

Distrust in this institution is dominant in 10 EU Member States, most of which, as we have seen, also distrust the previous institutions: Greece (74%), Spain (62%), the United Kingdom (59%), Cyprus (51%), Austria (46% versus 37%), Slovenia (46% versus 43%), Portugal (45% versus 39%), the Czech Republic (45% versus 42%), Italy (43% versus 35%) and Germany (39% versus 35% along with a very high D/K rate: 26%).



































Trust has risen sharply in Poland (+12). And as in the case of the other institutions, the index in Italy – while remaining negative – has recovered very sharply, climbing from -22 in spring 2012 to -8 today.

The Court of Justice of the European Union

As was the case in spring 2012, the Court of Justice is the only European institution that is trusted by a majority. This trust has consolidated in this survey (49%, +3 percentage points, versus 34%, -2). As with the other European institutions, the trust index is higher among respondents who have previously heard of the Court of Justice of the European Union (+27), than among those who have never heard of it (-24): this is the institution in respect of which the difference between these two groups is the most significant.

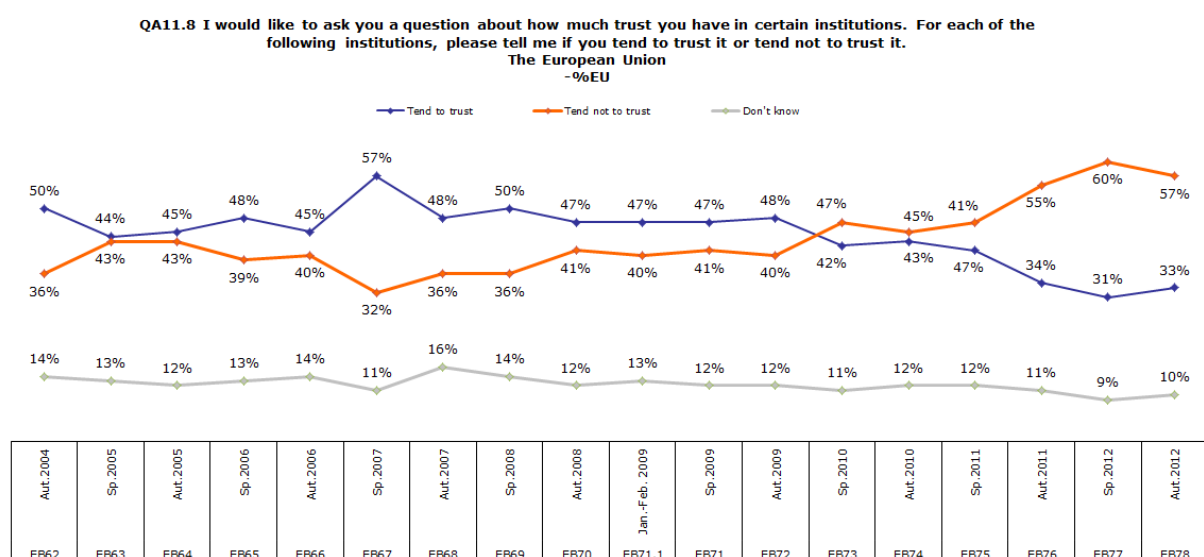
The trust index returns to positive territory in Portugal (+2 compared with -7 in spring 2012), and distrust is only expressed by a majority in four Member States: Greece (60%), Spain (59%), the United Kingdom (50%) and Italy (39% versus 35%). Once again a significant recovery of the trust index is observed in Italy, passing from -20 in spring 2012 to -4 today.

QA16 For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.
Answer - Tend to trust

		The Court of Justice of the European Union	Diff EB78 Aut.2012 - EB77 Sp.2012	The European Parliament	Diff EB78 Aut.2012 - EB77 Sp.2012	The European Commission	Diff EB78 Aut.2012 - EB77 Sp.2012	The Council of the European Union	Diff EB78 Aut.2012 - EB77 Sp.2012
	EU27	49%	+3	44%	+4	40%	+4	36%	+4
	BE	56%	-3	58%	+1	54%	-3	50%	=
	BG	59%	+9	61%	+7	59%	+8	53%	+9
	CZ	49%	+3	46%	+3	43%	+4	42%	+4
	DK	82%	+4	67%	+5	62%	+4	50%	+4
	DE	67%	+2	45%	+1	39%	+4	35%	+3
	EE	63%	-2	57%	+1	55%	+1	52%	+1
	IE	47%	+8	43%	+7	40%	+6	36%	+6
	EL	34%	+1	28%	+1	20%	=	21%	-2
	ES	27%	+1	25%	=	23%	=	23%	+2
	FR	47%	-1	47%	+2	42%	-1	37%	+1
	IT	35%	+8	43%	+8	40%	+8	35%	+8
	CY	44%	-2	39%	+1	34%	-1	35%	-1
	LV	50%	+3	43%	=	40%	+2	37%	+1
	LT	59%	+8	56%	+4	56%	+8	52%	+8
	LU	70%	+3	60%	+1	56%	+1	52%	+4
	HU	56%	+4	57%	+4	54%	+5	48%	+3
	MT	53%	+5	55%	+10	49%	+7	48%	+7
	NL	64%	-2	55%	+4	53%	+1	44%	=
	AT	57%	=	48%	+6	40%	+6	37%	+4
	PL	63%	+9	60%	+11	58%	+12	55%	+12
	PT	42%	+5	46%	+8	44%	+8	39%	+5
	RO	50%	+1	55%	+2	50%	+1	48%	+1
	SI	57%	+4	48%	+6	47%	+5	43%	+4
	SK	62%	-2	54%	-2	53%	-1	50%	-2
	FI	68%	+3	57%	+6	56%	+4	49%	+4
	SE	76%	+2	58%	=	54%	+2	39%	+4
	UK	35%	+5	24%	+3	24%	+5	20%	+4
	CY (tcc)	NA	NA	43%	-2	39%	-4	40%	-2
	HR	NA	NA	40%	-2	37%	-3	39%	-2
	TR	NA	NA	21%	-1	20%	=	20%	=
	MK	NA	NA	40%	-6	37%	-4	38%	-2
	IS	NA	NA	45%	-3	42%	=	35%	-5
	ME	NA	NA	43%	+1	43%	+3	41%	+5
	RS	NA	NA	34%	-8	28%	-9	29%	-6

4.2. Trust in the European Union

For the first time since the Standard Eurobarometer of autumn 2010 (EB74), the continuous deterioration of trust and concomitant growth of distrust of the European Union has come to a halt. Standing at 57%, distrust has fallen by three percentage points since spring 2012, while trust has gained two percentage points, rising to 33%³⁹. Although the downward trend has stopped, the European Union is nevertheless still far from regaining all the ground it has lost since the autumn 2009 survey (EB72). The trust-distrust ratio, measured at -24 in this autumn 2012 survey, is the second worst ratio ever measured in the history of the Eurobarometer. It stood at +8 in autumn 2009.



Although it became negative for the first time in the history of the Eurobarometer in the previous survey, the trust index in the NMS12 countries is positive once more in this survey (+2 versus -4 in spring 2012). However, it remains firmly negative in EU15 countries (-32 versus -35), euro area Member States (-28 versus -31) and countries outside the euro area (-18 compared with -25). In these three groups of countries, an absolute majority of respondents expressed distrust of the European Union.

In this survey, the trust index has become negative in Belgium (-5 versus 0 in spring 2012) and in Slovakia (-3 versus +2). In contrast, it has recovered sharply in Poland (+6 versus -5).

³⁹ QA11.8. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it. The European Union.

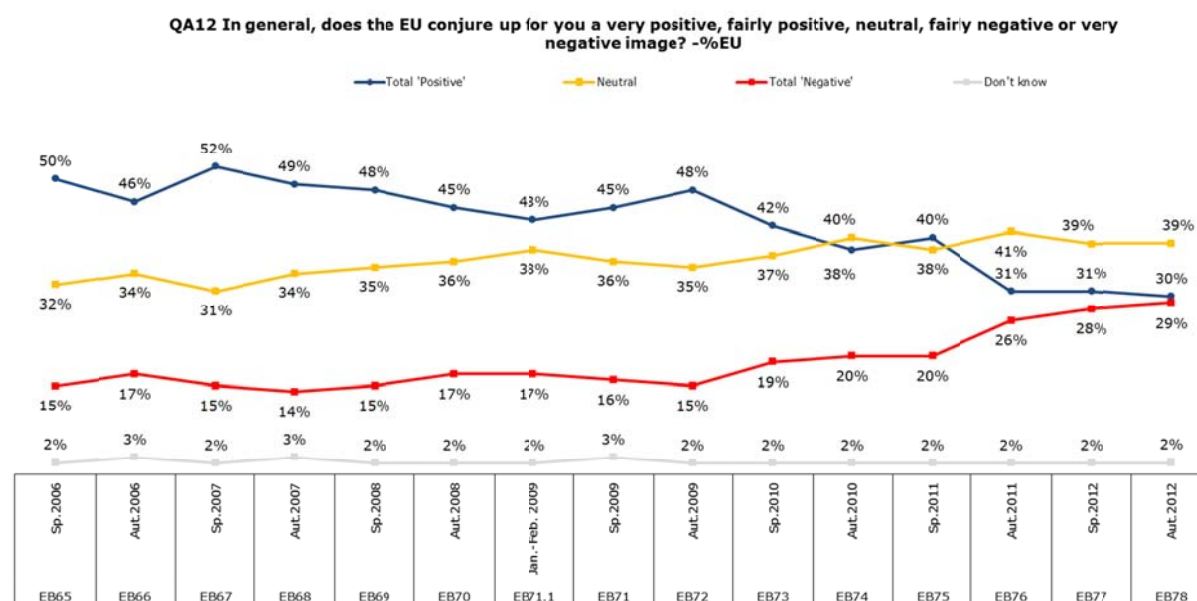
In total, the European Union currently only enjoys majority trust in seven Member States: Bulgaria (60% versus 24%), Lithuania (49% versus 37%), Poland (48% versus 42%), Denmark (48% versus 46%), Estonia (46% versus 38%), Malta (46% versus 34%) and Romania (45% versus 40%). Within this group, trust has risen significantly in Bulgaria (+5 points) but has lost ground in Estonia (-6).

Distrust is therefore the majority position in 20 EU countries, led by Greece (81%), Spain (72%), the UK (69%), Cyprus (64%), Sweden (62%), the Czech Republic (60%) and Germany (59%). In this group of 20 Member States, a significant recovery of the trust index is nevertheless observed in ten countries. Since spring 2012, the index has risen from -40 to -22 in Italy, from -32 to -24 in Portugal, from -28 to -18 in Austria, from -17 to -7 in Hungary, from -14 to -1 in Finland, from -59 to -49 in the United Kingdom, from -33 to -26 in the Czech Republic, from -15 to -8 in the Netherlands, from -13 to -9 in Latvia and from -31 to -29 in Germany.

Within the candidate countries, the trust index is only positive in the former Yugoslav Republic of Macedonia and Montenegro (both +7). It is negative and declining in Turkey (-40 versus -33 in spring 2012), Serbia (-26 versus -16) and Croatia (-24 versus -18). It remains negative but has improved slightly in Iceland (-22 versus -27).

4.3. The image of the European Union

The overall image of the EU has deteriorated very slightly in this survey, a sign that the upturn in confidence is still fragile. Three out of ten Europeans (30%, -1 percentage point) say they have a positive image of the EU, while 29% (+1) have a negative image. 39% (unchanged) have a "neutral" image and 2% (unchanged) express no opinion. At +1, the difference (positive image / negative image) is the slenderest ever measured by Eurobarometer⁴⁰. The downward trend of the EU's image in European public opinion has not therefore halted.

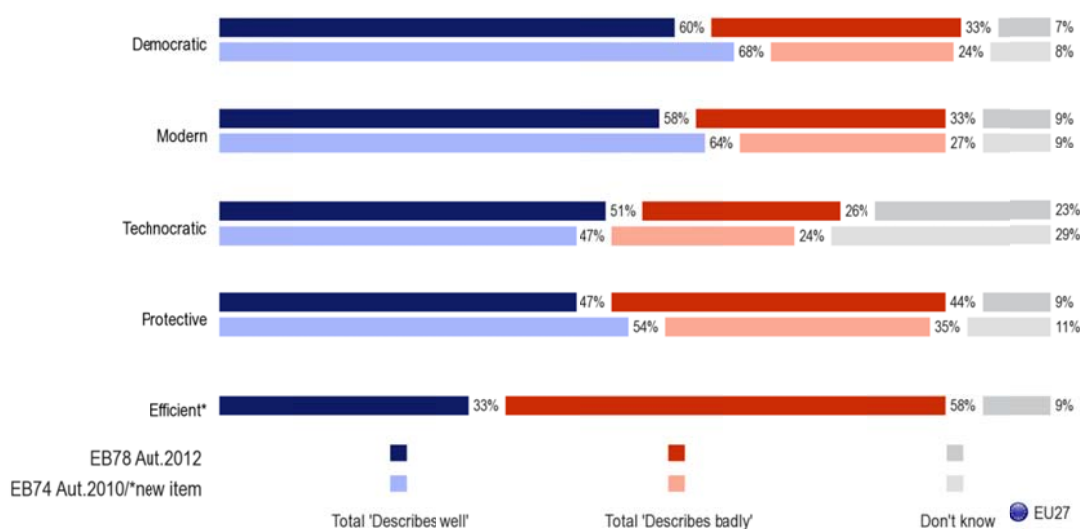


The percentage of positive opinions is above the European average of 30% in 14 Member States (Belgium, Bulgaria, Denmark, Germany, Ireland, France, Italy, Lithuania, Luxembourg, Malta, Netherlands, Poland, Romania and Slovenia) with the highest rates in Bulgaria (56%), Romania (42%) and Poland (40%). The proportion of negative opinions is greater than or equal to the EU average of 29% in 15 countries (Belgium, the Czech Republic, Ireland, Greece, Spain, France, Cyprus, Hungary, Netherlands, Austria, Portugal, Finland, Sweden, Slovakia and the United Kingdom), with highs recorded in Greece (49%), the United Kingdom (48%) and Cyprus (44%). Negative views on the image of the EU have gained significant ground in Greece (+9 percentage points), Cyprus (+8), Slovakia (+) and Portugal (+5).

⁴⁰ QA12. In general, does the EU conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?

The decline in the EU's image is even more apparent when we look in detail at a number of characteristics, both positive and negative. While the EU continues to appear democratic, modern and protective, it nevertheless does so to substantially fewer respondents than was the case in the previous surveys in autumn 2010 (EB74) and autumn 2008 (EB70), which are the points of comparison for this indicator. The EU is thus considered less democratic (60%, -8 percentage points), less modern (58%, -6) and less protective (47%, -7) than in autumn 2010. Since autumn 2008, these three aspects of the EU's image have all declined by as much as 10 percentage points in European opinion. At the same time, the image of a "technocratic" European Union has gained four percentage points since autumn 2010, and eight since autumn 2008, and has now spread to an absolute majority of respondents (51%). Lastly, the term "efficient", tested for the first time in this survey, describes the EU well for a third of Europeans (33% versus 58%)⁴¹.

QA14. Please tell me for each of the following words if it describes very well, fairly well, fairly badly or very badly the idea you might have of the EU.



Positive characteristics

The EU continues to appear democratic and modern to an absolute majority of Europeans, and protective to a relative majority. These perceptions have nonetheless declined sharply compared to previous surveys.

Six out of ten Europeans (60%, -8 percentage points since autumn 2010) say that **the term democratic** describes the EU well, while 33% (+9) are of the opposite opinion, 7% (-1) expressing no view.

⁴¹ QA14. Please tell me for each of the following words if it describes very well, fairly well, fairly badly or very badly the idea you might have of the EU. Democratic / modern / technocratic / protective / efficient.

Greece (67% "describes very badly" responses versus 32%) and Portugal (48% versus 45%) are the only two countries where a majority of respondents do not see the EU as democratic. Opinions are sharply divided in the UK (45% "describes well" versus 44%). Elsewhere, an absolute majority of respondents agree on the democratic nature of the EU. This should not, however, hide the fact that except in Germany, the United Kingdom and France, where the responses remain stable, and Finland (+5), this positive view has lost ground in all EU countries, with very large falls in Italy (-22), Greece (-21), Spain (-21), Portugal (-20), Cyprus (-20), Slovakia (-18) and the Czech Republic (-14).

The modernity of the EU is recognized by 58% of Europeans, a decline of six percentage points from autumn 2010. However, 33% (+6 percentage points) do not consider the EU to be modern. 9% (unchanged) express no opinion. The EU appears modern to an absolute majority of respondents in 23 EU countries and to a relative majority in two of them. Only in Greece and Sweden (50% versus 47% in both countries) do a majority consider that the term modern describes the European Union badly. As before, the view of the EU as modern declined most sharply in Italy (-16), Cyprus (-15), Slovakia (-14), Spain (-12), Portugal (-11), the Czech Republic (-11) and Greece (-8).

Lastly, the ratio of opinions becomes tighter on **the protective nature of the EU**. 47% of Europeans (-7 percentage points since autumn 2010) see the EU as protective, though 44% (+9) do not do so. 9% (-2) express no opinion. Although in autumn 2010 (54% versus 35%), and to an even greater extent in autumn 2008 (57% versus 29%), the idea of a protective EU attracted a wide consensus in Europe, opinions are now much more divided.

The erosion of the EU's "protective" image is evident in 22 of the 27 EU countries, and is very marked in Italy (-23), Greece (-18), Slovakia (-17), Spain (-16), Portugal (-16) and Cyprus (-15). Consequent to these downward trends, the ratio of opinions has reversed since autumn 2010 in six countries, France (43% versus 50% compared with 47% versus 43% in autumn 2010), Italy (37% versus 53% compared with 60% versus 31%), Portugal (36% versus 57% compared with 52% versus 34%), Spain (36% versus 53% compared with 52% versus 33%), the United Kingdom (44% versus 45% compared with 43% versus 38%) and Cyprus (36% versus 59% compared with 51% versus 38%). With Greece (21% versus 78%) and Austria (44% versus 51%) there are now eight countries where a majority of respondents feel that the word "protective" does not describe the EU well. Only four countries thus resist the downward trend in this indicator, Lithuania (+2) Denmark (+3), Finland (+3) and most notably Germany, where the perception of the EU as "protective" has seen an 8-point rise. The protective dimension of the EU is most widely perceived in Denmark (69%) and Lithuania (67%).





























Negative characteristics

An absolute majority of Europeans (51%) now consider the EU to be "**technocratic**", an increase of four percentage points since autumn 2010. However, just over a quarter (26%, +2 percentage points) believe that this term describes the EU badly and 23% (-6) express no opinion. The idea that the European Union is technocratic is widespread in all Member States, and includes an absolute majority of respondents in 16 of them, led by Greece (68%), Cyprus (64%), Belgium (61%), France (60%), Germany (60%) and Finland (60%). This description has gained ground significantly in Bulgaria (+24), Poland (+20), Lithuania (+14) and Romania (+10).

Finally, a large majority of Europeans (58% against 33%) do not regard the EU as **efficient**. Six countries stand out clearly from the European norm: an absolute majority of respondents in Bulgaria (62%), Lithuania (60%) and Poland (59%) and a relative majority in Estonia (46% versus 38%), Malta (47% versus 34%) and Romania (47% versus 28%) recognise the efficiency of the EU. In contrast, respondents are most likely to say that "efficient" does not describe the EU in Sweden (82%), Greece (80%), the Netherlands (77%) and the United Kingdom (68%).

QA14 Please tell me for each of the following words if it describes very well, fairly well, fairly badly or very badly the idea you might have of the EU.

Answer - Total 'Describes well'

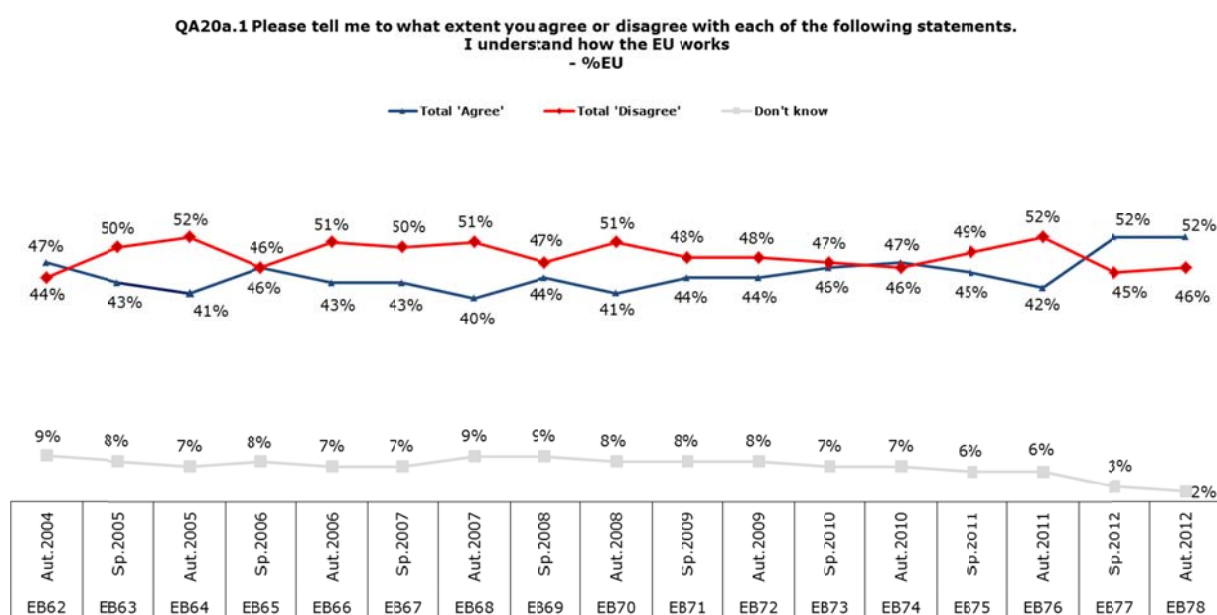
		Democratic	Diff EB78 Aut.2012 - EB74 Aut.2010	Modern	Diff EB78 Aut.2012 - EB74 Aut.2010	Technocratic	Diff EB78 Aut.2012 - EB74 Aut.2010	Protective	Diff EB78 Aut.2012 - EB74 Aut.2010	Efficient*
	EU27	60%	-8	58%	-6	51%	+4	47%	-7	33%
	BE	64%	-11	65%	-5	61%	-7	54%	-11	33%
	BG	80%	-3	81%	+3	47%	+24	63%	-2	62%
	CZ	59%	-14	59%	-11	55%	+4	54%	-10	45%
	DK	69%	-3	53%	-3	58%	-2	69%	+3	29%
	DE	70%	=	55%	-2	60%	+6	57%	+8	27%
	EE	63%	-12	66%	-8	54%	-3	65%	-6	46%
	IE	54%	-9	72%	-1	46%	+5	53%	-5	42%
	EL	32%	-21	47%	-8	68%	-4	21%	-18	17%
	ES	51%	-21	53%	-12	39%	-3	36%	-16	25%
	FR	65%	=	58%	-5	60%	+4	43%	-4	27%
	IT	54%	-22	58%	-16	45%	+5	37%	-23	40%
	CY	51%	-20	48%	-15	64%	=	36%	-15	27%
	LV	60%	-7	68%	-1	49%	-6	57%	-1	39%
	LT	70%	-5	61%	-6	44%	+14	67%	+2	60%
	LU	75%	-3	68%	-8	59%	+2	57%	-12	33%
	HU	66%	-10	64%	-8	47%	=	55%	-10	47%
	MT	66%	-6	73%	-7	44%	+4	60%	-4	47%
	NL	62%	-3	52%	-1	51%	=	61%	-2	18%
	AT	59%	-2	58%	+6	59%	+6	44%	-1	37%
	PL	80%	-1	80%	-2	54%	+20	59%	-3	59%
	PT	45%	-20	59%	-11	39%	+1	36%	-16	30%
	RO	66%	-5	67%	-4	44%	+10	47%	-6	47%
	SI	58%	-6	60%	-5	57%	=	48%	-7	38%
	SK	65%	-18	70%	-14	51%	=	59%	-17	40%
	FI	59%	+5	72%	+1	60%	-2	58%	+3	36%
	SE	64%	-2	47%	-10	51%	-3	51%	-7	15%
	UK	45%	=	49%	+1	38%	-5	44%	+1	23%

* New item

5. KNOWLEDGE OF THE EUROPEAN UNION

5.1. Knowledge of how the European Union works

After gaining ground significantly in the previous Eurobarometer survey, respondents' sense that they understand how the European Union works has stabilised in this survey. 52% of Europeans (unchanged) say they understand how the European Union works, while 46% (+1 percentage point) say they do not, 2% (-1) expressing no opinion⁴². For the second successive time in the history of Eurobarometer, an absolute majority of respondents believe that they understand how the EU works.



Respondents are most likely to say that they understand how the European Union works in Sweden (70%), Poland (65%), Luxembourg (63%) and Estonia (63%). This belief commands a majority in 21 of the 27 Member States. Only in Italy (60% of 'totally disagree' versus 36%), Portugal (58% versus 41%), Hungary (53% versus 46%), the Czech Republic (53 % versus 45%), Malta (51% versus 47%) and Spain (50% versus 49%) do majorities say that they do not understand how the EU works.

The opinion ratio tends towards stability for this indicator in the vast majority of EU countries. Only Bulgaria, where the sense of understanding has gained seven percentage points and Belgium, which has seen an 8-point fall, really stand out.

⁴² QA20a.1 Please tell me to what extent you agree or disagree with each of the following statements. I understand how the EU works.

5.2. Objective Knowledge of the European Union

This Eurobarometer survey also included a test of Europeans' objective knowledge of the EU. To this end, three statements ("the EU currently consists of 27 Member States", "the members of the European Parliament are directly elected by the citizens of each Member State", "Switzerland is a member of the EU") were put to the respondents, who were asked to say whether each statement was true or false. The same question was asked in the previous Eurobarometer survey in spring 2012.

Objective knowledge of the EU remains essentially the same as in spring 2012: the average of correct answers to the three questions is 63% (=); that of wrong answers is 20% (=), and the average of "don't know" responses is 17%. The average of correct answers for the three statements exceeds 50% in all Member States, the lowest scores being recorded in the United Kingdom (53%), Spain (56%) and Latvia (57%), and the highest in Greece (80%), Luxembourg (78%) and Slovenia (77%).

Detailed analysis shows that more than seven out of ten Europeans (71%, =) know that **Switzerland is not a member of the EU**, while 17% (+1 percentage point) answer wrongly and 12% (-1) say they "don't know"⁴³. In every European Union country, a majority of respondents answers the question correctly. The highest rate of correct answers is recorded in Luxembourg (92%), the lowest in Romania (52%) and Latvia (52%).

A little more than two-thirds of Europeans know that **the EU currently consists of 27 Member States**, while 12% answer wrongly and 21% reply "don't know"⁴⁴. These proportions show no change since spring 2012. An absolute majority of respondents are able to give the correct answer in all European Union countries, ranging from 51% in the UK to 84% in Slovakia.

Finally, though the proportion of correct answers is lower for the statement that "the members of the European Parliament are directly elected by the citizens of each Member State," an absolute majority of Europeans nevertheless correctly answer in the affirmative (52%, = compared to spring 2012). Three in ten mistakenly think that the statement is false (30%, =), and 18% say they "don't know"⁴⁵. The Netherlands is the only EU country where a majority of respondents give the wrong answer (50% against 41%).

Following five and three-point increases in correct answers respectively, a relative majority of respondents in Austria (47% versus 40%) and France (41% versus 37%) now answer correctly, which was not the case in spring 2012.

⁴³ QA17.3 For each of the following statements about the EU could you please tell me whether you think it is true or false. Switzerland is a member of the EU.

⁴⁴ QA17.1 For each of the following statements about the EU could you please tell me whether you think it is true or false. The EU currently consists of 27 Member States.

⁴⁵ QA17.2 For each of the following statements about the EU could you please tell me whether you think it is true or false. The members of the European Parliament are directly elected by the citizens of each Member State.

The European Parliament's electoral system is most familiar in Greece (85%), Malta (85%) and Cyprus (83%), and the ratio of right to wrong answers remains fairly even in Germany (43% against 40%).

Objective knowledge of the EU varies considerably depending on interest in politics. The average of correct answers ranges from 74% among respondents who have a strong interest in politics to 49% among those who are not at all interested in politics. The figure is 69% for those with an interest in European affairs, and 54% for those with no interest.

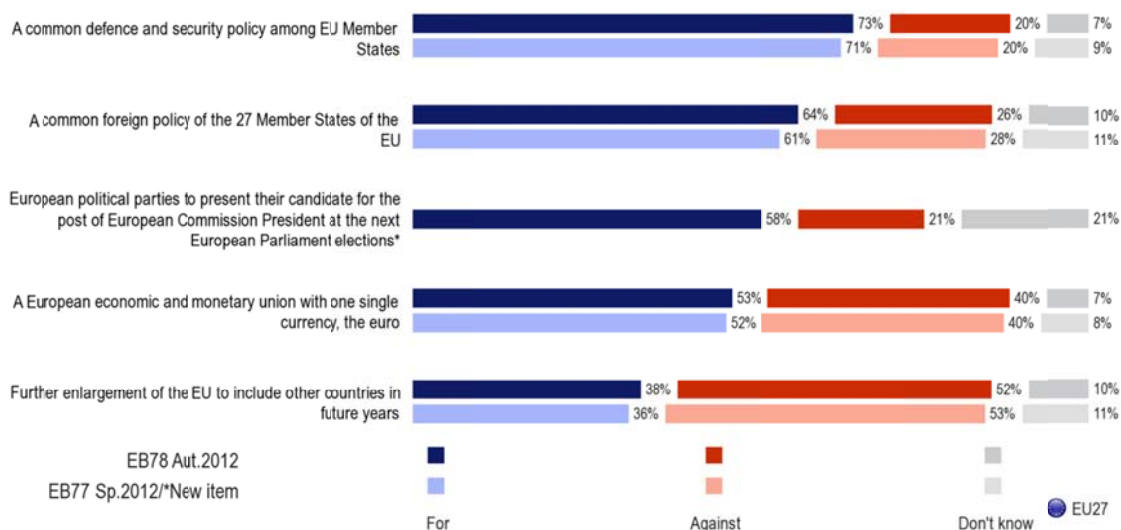
III. THE EUROPEAN UNION NOW AND IN THE FUTURE

– Rising support for European policies, enlargement and proposals for an elected European Commission President –

1. SUPPORT FOR EUROPEAN POLICIES

Despite a difficult climate of opinion (distrust of the European Union, the downward trend in its image), support for EU policies has strengthened since the survey in spring 2012 (EB77). Support for a common foreign policy is thus up by three percentage points, for a common security and defence policy up by two percentage points, and for economic and monetary union up by one percentage point. Support for enlargement has gained two percentage points but remains largely a minority view with the European public. Finally, the proposal that political parties should put forward candidates for the post of President of the European Commission at future European elections, tested for the first time in this survey, meets with widespread approval.

QA18. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.



A common security and defence policy among EU Member States

There continues to be consensus on this policy in European public opinion. Nearly three-quarters of respondents (73%, +2 percentage points) say they are in favour, while 20% (unchanged) say they are not, and 7% (-2) express no opinion⁴⁶.

⁴⁶ QA18.4. Please tell me for each statement, whether you are for it or against it. A common defence and security policy among EU Member States.

An absolute majority of respondents in all European Union countries support this policy, most strikingly in Slovakia (84%), Cyprus (84%), Estonia (84%) Bulgaria (83%) and Slovenia (83%).

Support for this policy has increased in particular in Hungary (+7), Ireland (+7) and Slovenia (+6). Under the effect of this evolution, an absolute majority of respondents in Ireland now say they are in favour of this policy, whereas only a relative majority did so in spring 2012. This country nevertheless has one of the highest proportions of opponents (34%, unchanged) of a common security and defence policy in the EU, as do the United Kingdom (37%, unchanged), Sweden (43%, +1) and Finland (44%, +4).

A common foreign policy of the 27 Member States of the EU

Nearly two-thirds of Europeans (64%, +3 points) support a common foreign policy of the 27 Member States of the EU, while 26% (-2) say they are opposed and 10% (-1) express no opinion⁴⁷.

Traditionally, opinions in the Nordic countries and the United Kingdom are the most hostile to a common foreign policy. This is once again confirmed in this survey. Opposition continues to command a majority in Sweden (60%, +1 versus 37%), Finland (55%, +4, versus 41%), Denmark (50%, -2, versus 46%) and the United Kingdom (46%, -3, versus 40%). In almost all other countries, an absolute majority of respondents support a common foreign policy, with the highest levels of support in Bulgaria (78%), Germany (77%) and Slovakia (77%). The sole exceptions are the Czech Republic (49% versus 46%) and Malta (48% versus 31%) where the majority is only relative.

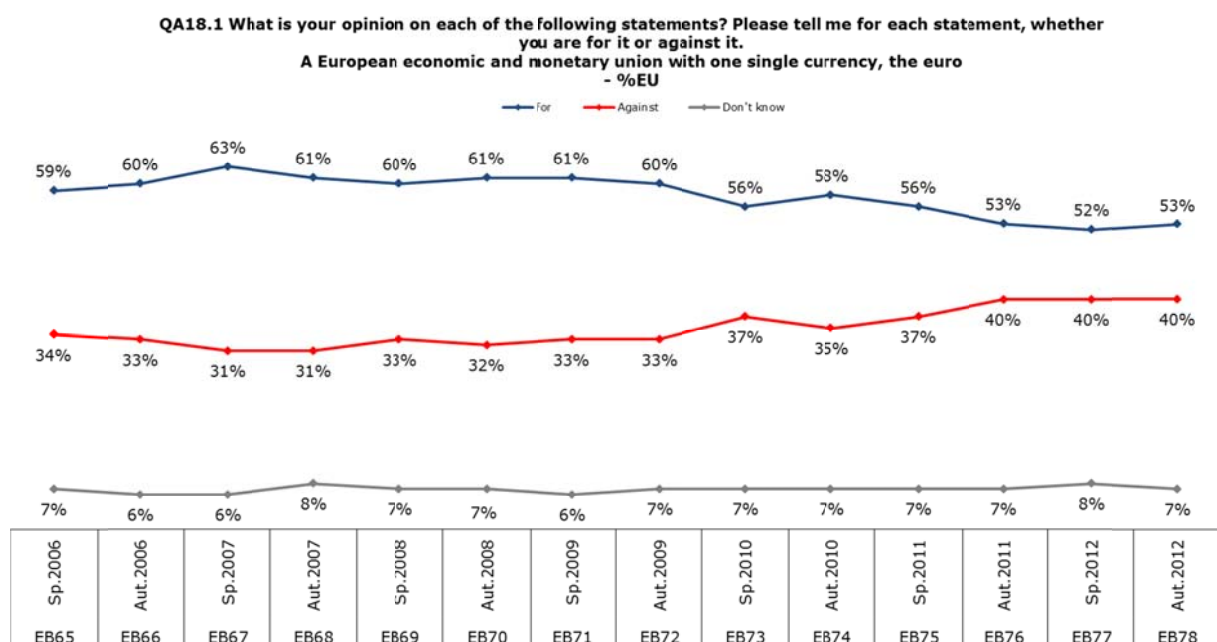
Support has consolidated significantly in France (+8) and Spain (+6). However, it is crumbling in Ireland (-9).

European economic and monetary union with a single currency, the euro

53% of Europeans (+1 percentage point) support economic and monetary union. Four in ten (unchanged) are opposed and 7% (-1) express no opinion⁴⁸. While the ratio between favourable / unfavourable opinions initially narrowed between spring 2007 (EB67) and autumn 2011 (EB76), it has remain remarkably stable since.

⁴⁷ QA18.2. Please tell me for each statement, whether you are for it or against it. A common foreign policy of the 27 Member States of the EU.

⁴⁸ QA18.1. Please tell me for each statement, whether you are for it or against it. A European economic and monetary union with one single currency, the euro.



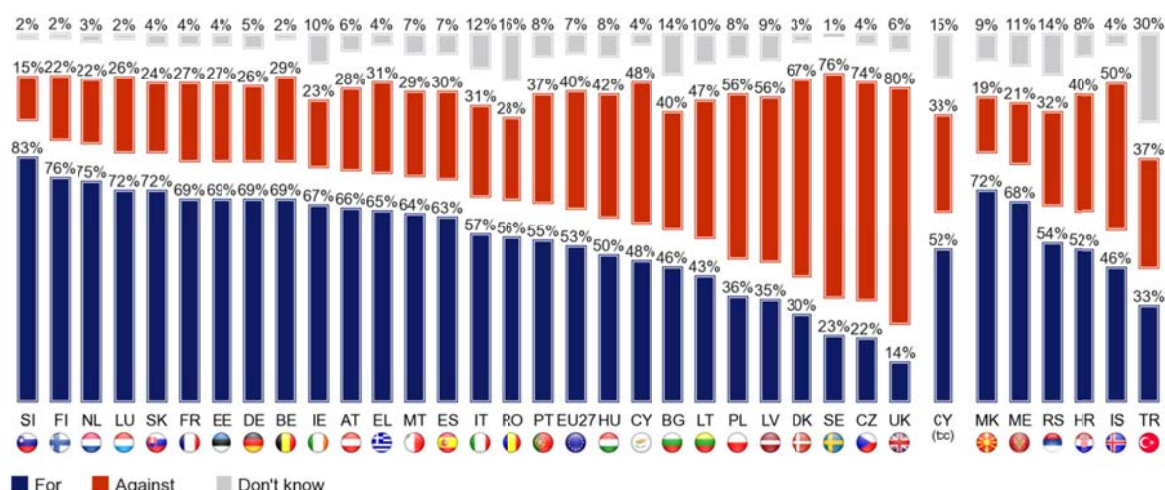
There are wide differences in how economic and monetary union is seen in euro area countries and in those which have not adopted the European currency: there is widespread and growing support within the euro area (66%, +3 percentage points), while it remains a largely minority view and is even crumbling (30%, -1) among countries which are outside the euro area. Approval of the euro is also much stronger in the EU15 countries (56% versus 38%) than in the NMS12 countries (45% versus 46%).

Support for economic and monetary union is dominant in 19 of the Member States, down from 20 in spring 2012. The ratio of opinions in Cyprus has shifted from positive (52% versus 44%) to balanced (48% versus 48%). The 19 Member States where the opinion ratio is favourable to the euro are Slovenia (83%), Finland (76%), the Netherlands (75%), Luxembourg (72%), Slovakia (72%), Belgium (69%), Germany (69%), France (69%), Estonia (69%), Ireland (67%), Austria (66%), Greece (65%), Malta (64%), Spain (63%), Italy (57%), Romania (56%), Portugal (55%), Hungary (50%) and Bulgaria (46% against 40%). Within this group, support for the euro has declined significantly since spring 2012 in Ireland (-12), Greece (-10), Slovakia (-8), Bulgaria (-8) Luxembourg (-6) and Belgium (-6). In contrast, support has strengthened in Spain (+8), Italy (+4) and Germany (+4).

A majority of respondents oppose the euro, as was the case in spring 2012, in seven Member States, all outside the euro area. These are the United Kingdom (80%, +1), Sweden (76%, +5), the Czech Republic (74%, +3), Denmark (67%, -2), Poland (56%, +1), Latvia (56%, +2) and Lithuania (47%, unchanged, versus 43%).

QA18.1. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.

A European economic and monetary union with one single currency, the euro



In the candidate countries, the most notable change is the sharp decline in support for economic and monetary union in Croatia (52%, -10) and Serbia (54%, -9), though it remains the majority view in both countries. Support for the euro has dipped but remains high in the former Yugoslav Republic of Macedonia (72%, -6) and Montenegro (68%, -4). The opinion ratio remains close in Iceland (46% approval versus 50% compared with 47% versus 49% in spring 2012). Lastly, while remaining the minority view, support for economic and monetary union has increased in Turkey, with 33% in favour (+4) and 37% (-5) opposed. A high proportion express no opinion, as in previous surveys (30%, +1).

The social attributes of individuals play an important role in determining their opinions of economic and monetary union. Thus 61% of those who studied up to age 20 and beyond support the euro, compared with 45% of those who left school before the age of 16. 60% of managers say they are in favour of economic and monetary union compared with 49% of manual workers. People who almost never have difficulties paying their bills are also significantly more likely to support economic and monetary union (58%) than those who struggle to pay their bills most of the time. Lastly, two-thirds of those who define themselves as belonging to the "upper class" of society are in favour of the euro, as against 43% of those who describe themselves as "working class."

Further enlargement of the EU to include other countries in future years

European public opinion is unchanged on this issue. 52% of Europeans (-1 percentage point) say they are opposed to this policy, while 38% (+2) are in favour and 10% (-1) express no opinion⁴⁹.

⁴⁹ QA18.3. Please tell me for each statement, whether you are for it or against it. Further enlargement of the EU to include other countries in future years.

However, the question of enlargement provokes strong disparities depending on the group of countries concerned. As in the spring 2012, and with no major change, an absolute majority of respondents in the EU15 countries (58%) and the euro area (58%) are opposed to future enlargement. In contrast, support for enlargement is dominant and has even strengthened in the NMS12 countries (59%, +3) and in countries outside the euro area (49%, +3, against 41%).

National analysis highlights significant differences between Member States. There is support for enlargement in 10 of them: Poland (69%), Lithuania (62%), Slovenia (61%), Romania (58%), Bulgaria (58%), Hungary (54%), Malta (50%), Latvia (49% versus 36%), Estonia (47% versus 42%) and Spain (46% versus 35%). Within this group the most significant evolutions are the increase in support in Poland (+7) and Spain (+5).

Though it was positive in spring 2012, the ratio of opinions is now evenly balanced in Slovakia (46% versus 46% compared to 52% versus 42%) and Sweden (48% versus 48% compared to 51% versus 45%). The ratio is now negative in Portugal (40% versus 46% compared with 44% versus 41%). Portugal joins the bloc of 15 countries in the survey where opposition to enlargement is the majority position, opposition being strongest in Germany (73%), Austria (72%), Luxembourg (70%) and France (68%). Within this group, the only change concerns Ireland, where support for enlargement rose nine percentage points, narrowing the ratio sharply (43% versus 44% compared with 34% versus 47% in spring 2012).

European political parties to present their candidate for the post of European Commission President at the next European Parliament elections.

Tested for the first time in this survey, this proposal has the support of an absolute majority of 58% of Europeans, while 21% say they are opposed and a further 21% express no opinion⁵⁰. The majority of respondents in all EU countries support this idea, most strikingly in Hungary (76%), Sweden (71%), Germany (69%), Slovakia (69%), Greece (67%) and Denmark (67%). In the United Kingdom (44% versus 32%) and Estonia (49% versus 17%), the proposal commands only a relative majority. Respondents are less likely to have taken up a firm opinion on this proposal; the "don't know" rate ranges from 12% in Belgium and Hungary to 34% in Latvia and Estonia.

⁵⁰ QA18.5. Please tell me for each statement, whether you are for it or against it. European political parties to present their candidate for the post of European Commission President at the next European Parliament elections.

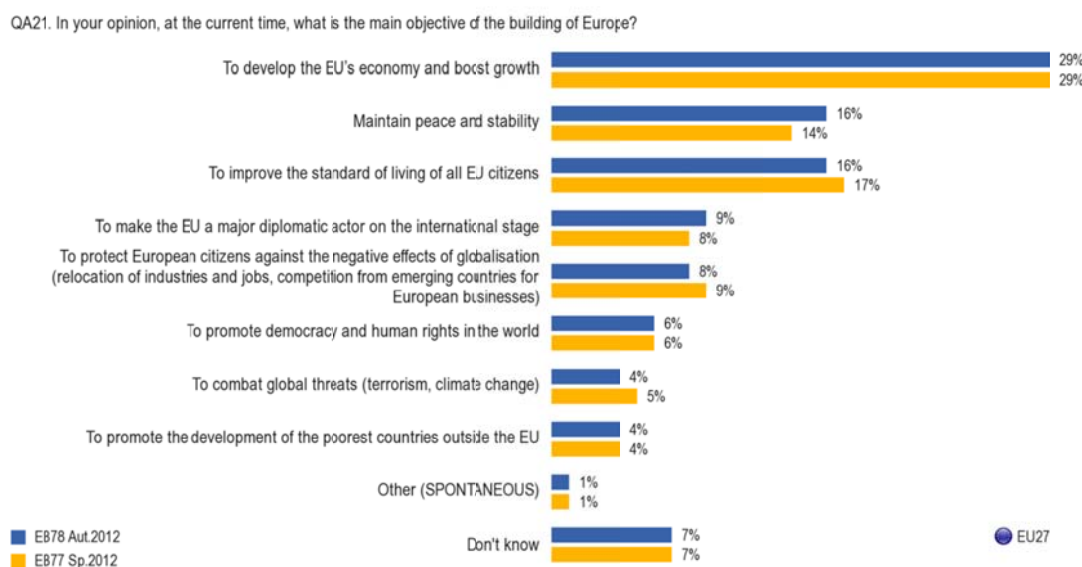
2. THE OBJECTIVE OF THE BUILDING OF EUROPE

Respondents were asked what they thought was the main objective of the building of Europe, and what they thought the main objective should be.

Though there is an overall convergence between what the European public see as the actual objectives of the building of Europe, and what they would like them to be – the three leading objectives are the same in both categories - there is a slight, and new, mismatch. **Developing the EU's economy and boosting growth** is the leading perceived objective by a substantial margin, while when respondents are asked what the EU's objects should be, **developing the EU's economy and boosting growth** and **an improved standard of living for EU citizens** are mentioned almost equally. Faced with the crisis, the European public is now hoping for both renewed growth and improved living conditions.

2.1. The perceived objectives of the building of Europe

With 29% of mentions (unchanged from spring 2012), economic development and boosting growth in the EU tops the list of main perceived objectives of the building of Europe by a considerable margin. This item ranks ahead of maintaining peace and stability (16%, +2 percentage points) and improving the standard of living of all EU citizens (16%, -1), both with an equal number of mentions. All other issues receive less than 10% of mentions⁵¹.

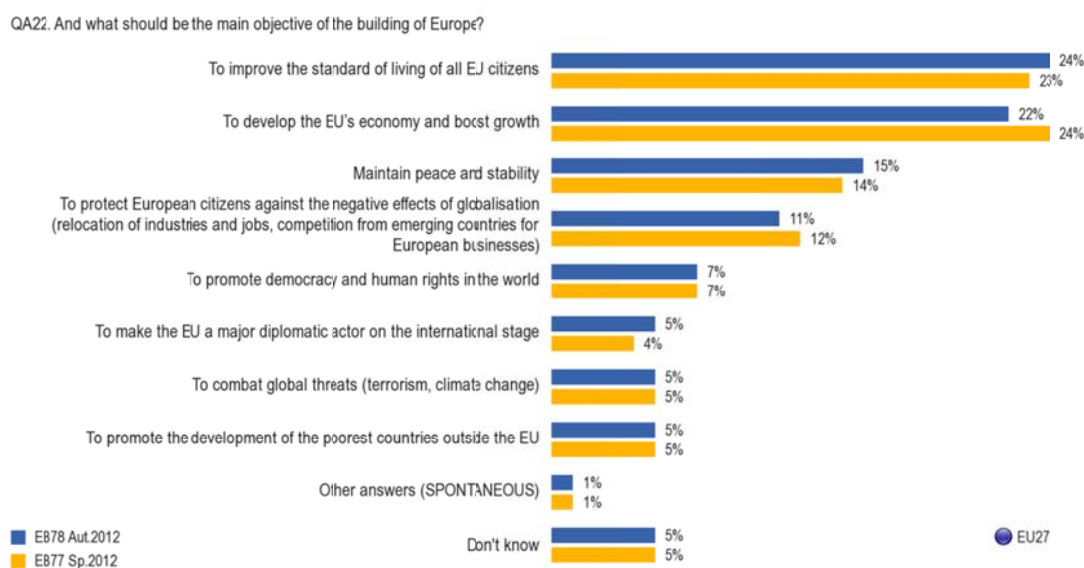


⁵¹ QA21. In your opinion, at the current time, what is the main objective of the building of Europe? (one possible answer only)

The perception of the EU's current main objective is broadly shared across the Member States of the European Union. With the exceptions of Malta and Latvia, where improvement in living standards of Europeans ranked first (30% and 27%), development and growth is seen as the primary EU objective in all countries, led by the Netherlands (46%), Denmark (45%) and Sweden (40%).

2.2. Desirable objectives for the building of Europe

With 24% of mentions (+1 percentage point), improving the standard of living of all EU citizens heads the list of desirable objectives of the EU, whereas it ranked second in the previous survey in spring 2012. This issue stands just ahead of developing the economy and boosting growth (22%, -2), and is followed by maintaining peace and stability (15%, +1) and protecting citizens against the negative effects of globalization (11%, -1). The other issues did not reach more than 10% of mentions⁵².



Improving the standard of living of all EU citizens tops the list of objectives considered desirable for the building of Europe in 18 EU countries (Belgium, Bulgaria, the Czech Republic, Estonia, Ireland, Greece, France, Cyprus, Latvia, Luxembourg, Malta, Austria, Poland, Portugal, Romania, Slovenia, Slovakia and the United Kingdom), with the most mentions in Bulgaria (43%), Latvia (37%) and Slovakia (36%). Mentions of this objective register the strongest growth in Cyprus (+8) and Slovenia (+7).

Developing the economy and boosting growth is the most desirable goal in four Member States: the Netherlands (33%), Denmark (32%), Spain (23%) and Italy (22%).

Improving the standard of living and developing economic growth tied for mentions in Lithuania (27%) and Hungary (26%).

⁵² QA22. And what should be the main objective of the building of Europe? (only one answer possible).

Lastly, three countries stand out by identifying maintaining peace and stability as the most desirable objective of the building of Europe: Sweden (28%), Germany (26%) and Finland (25%).

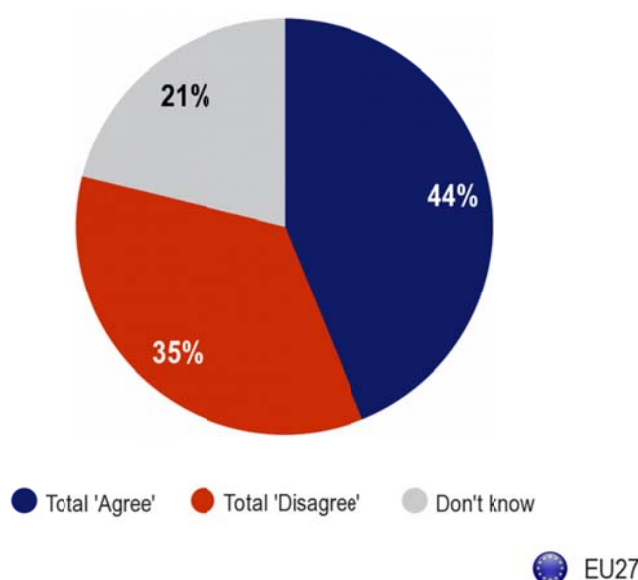
3. THE FUTURE OF THE EUROPEAN UNION

3.1. Opinions on a federation of nation states

More than four out of ten Europeans are in favour of developing the European Union into a federation of nation-states while 35% are opposed to the idea. The percentage expressing no opinion, 21%, is high on this question⁵³.

QA20a.12. Please tell me to what extent you agree or disagree with each of the following statements.

The EU should develop further into a federation of Nation-States



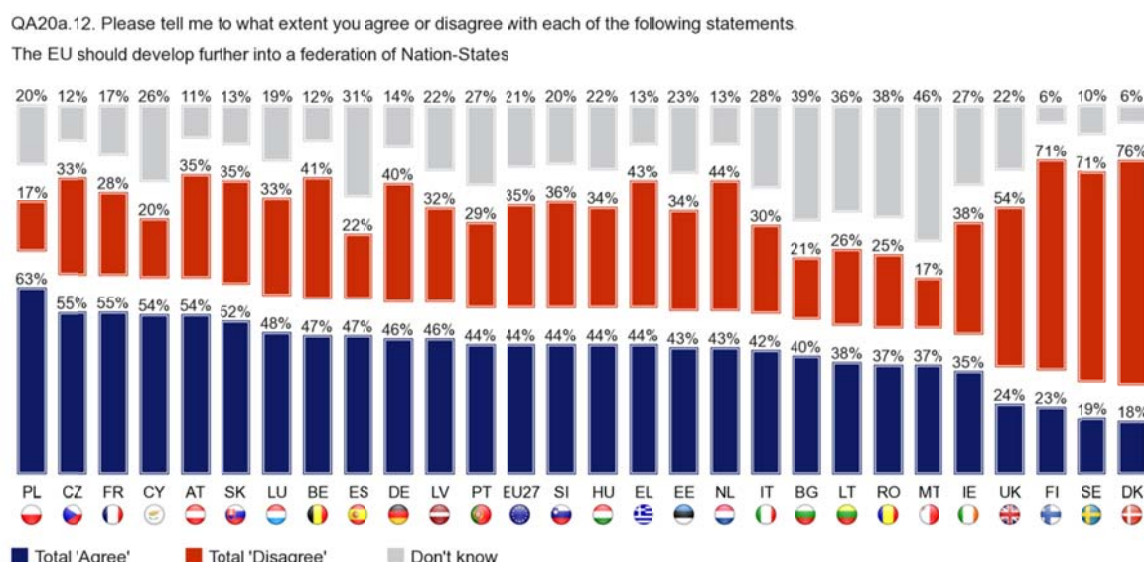
National differences are very marked: thus there is strong opposition to this idea in the Nordic countries (76% in Denmark, 71% in Sweden and Finland) and in the United Kingdom (54%).

In contrast, an absolute majority of respondents support the development of the EU into a federation of nation states in Poland (63%), the Czech Republic (55%), France (55%), Cyprus (54%), Austria (54%) and Slovakia (52%) and a large relative majority in Luxembourg (48% versus 33%), Belgium (47% versus 41%), Spain (47% versus 22%), Latvia (46% versus 32%), Germany (46% versus 40%), Hungary (44% versus 34%), Portugal (44% versus 29%), Slovenia (44% versus 36%), Estonia (43% versus 34%), Italy (42% versus 30%), Bulgaria (40% versus 21%), Lithuania (38% versus 26%), Malta (37% versus 17%) and Romania (37% versus 25%).

⁵³ QA20a.12 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec l'affirmation suivante ? L'UE devrait davantage se développer en une fédération d'Etats-nations.

In three countries, the ratio of those supporting / opposing the idea of a federation of nation states is very close: Greece (44% versus 43%), the Netherlands (43% versus 44%) and Ireland (35% versus 38%).

Lastly, the high "don't know" rate in some countries suggests that this debate is still poorly understood by a large proportion of the population in some countries. This is particularly the case in Malta (46% "don't know"), Bulgaria (39%), Romania (38%) and Lithuania (36%).



Socio-demographic analysis reveals a number of differences between categories, which can be explained most often by variations in the "don't know" rate. Thus, while the people who studied until the age of 20 and beyond are more likely to support the development of the EU into a federation of nation states (49%) than those who left school before age 16 (37%), they are also more likely to oppose it (37% versus 33%). This is because the "don't know" rate is much lower among the most educated respondents (14% versus 30%). There is also firmer support among respondents with a strong interest in politics (49%), and those who say they belong to the "upper class" of society (56%). Lastly, respondents who feel that their voice counts in the European Union are much more likely to support the development of the EU into a federation of nation states (58% versus 29%) than those who feel they are not being listened to (38% versus 40%).

QA20a.12 Please tell me to what extent you agree or disagree with each of the following statements. The EU should develop further into a federation of Nation-States

The EU should develop further into a federation of Nation-States

	Total 'Agree'	Total 'Disagree'	Don't know
EU27	44%	35%	21%

 **Gender**

Male	48%	36%	16%
Female	40%	34%	26%

 **Age**

15-24	44%	35%	21%
25-39	46%	34%	20%
40-54	44%	36%	20%
55 +	42%	35%	23%

 **Education (End of)**

15-	37%	33%	30%
16-19	43%	35%	22%
20+	49%	37%	14%
Still studying	45%	35%	20%

 **Socio-professional category**

Self-employed	46%	36%	18%
Managers	46%	42%	12%
Other white collars	50%	35%	15%
Manual workers	42%	36%	22%
House persons	39%	30%	31%
Unemployed	43%	33%	24%
Retired	42%	34%	24%
Students	45%	35%	20%

Considers belonging to

The working class	39%	35%	26%
The middle class	48%	35%	17%
The upper class	56%	35%	9%

 **Political interest index**

Strong	49%	39%	12%
Average	47%	36%	17%
Low	40%	35%	25%
Not at all	35%	31%	34%










My voice counts in the EU

Agree	58%	29%	13%
Disagree	38%	40%	22%

The tables below also show the socio-demographic results for the six largest EU countries and for three countries which have been severely affected by the economic and financial crisis.

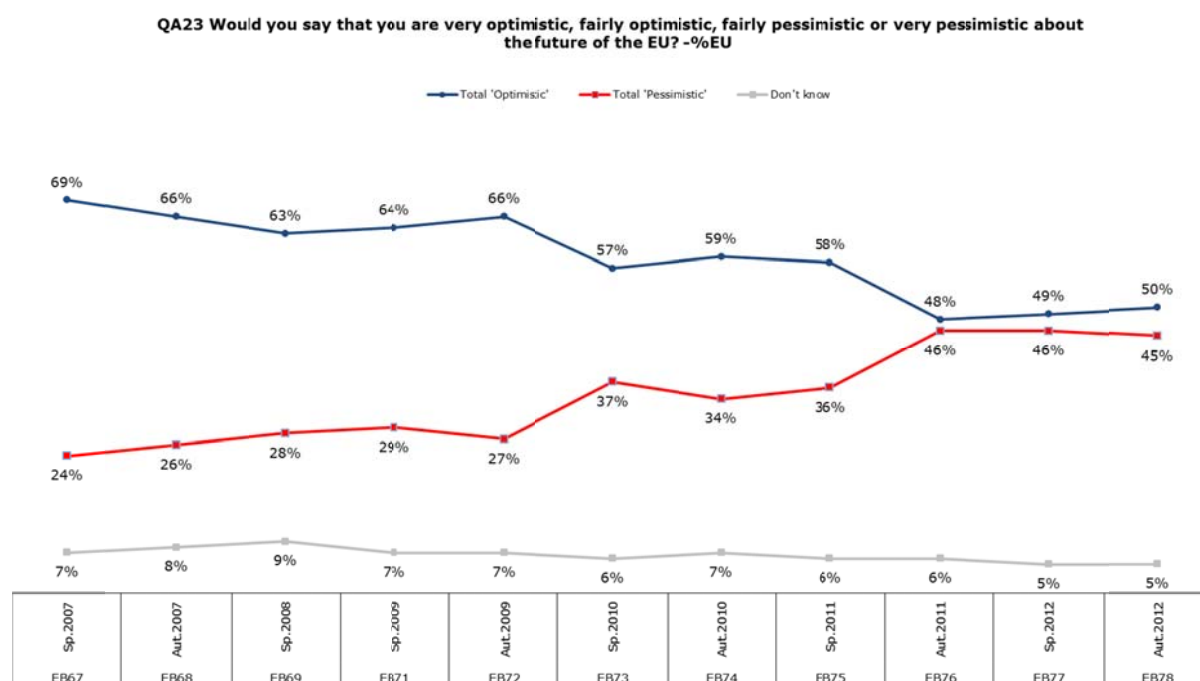
QA20a.12 Please tell me to what extent you agree or disagree with each of the following statements.
The EU should develop further into a federation of Nation-States

Answer - Total 'Agree'

	DE 	ES 	FR 	IT 	PL 	UK 	EL 	PT 	IE 
Gender									
Men	47%	55%	60%	46%	64%	28%	49%	45%	37%
Women	45%	40%	50%	37%	60%	20%	40%	43%	33%
Age									
15-24	47%	48%	45%	44%	69%	31%	46%	53%	30%
25-39	47%	48%	57%	42%	69%	32%	44%	45%	36%
40-54	42%	50%	55%	47%	62%	23%	50%	44%	35%
55 +	50%	46%	58%	36%	54%	17%	40%	37%	36%
Education (End of)									
15-	44%	44%	52%	28%	49%	18%	38%	40%	28%
16-19	44%	47%	53%	45%	59%	24%	41%	50%	33%
20+	50%	58%	61%	60%	66%	28%	55%	52%	42%
Still studying	47%	44%	48%	46%	74%	27%	46%	59%	30%
Socio-professional category									
Self-employed	42%	53%	62%	46%	62%	25%	50%	48%	44%
Managers	45%	66%	61%	55%	72%	22%	60%	59%	50%
Other white collars	48%	61%	55%	52%	74%	31%	47%	53%	50%
Manual workers	43%	50%	52%	33%	59%	28%	42%	42%	26%
House persons	47%	31%	51%	37%	68%	21%	34%	36%	30%
Unemployed	44%	46%	50%	39%	54%	32%	45%	42%	34%
Retired	50%	50%	58%	35%	55%	16%	40%	38%	33%
Students	47%	44%	48%	46%	74%	27%	46%	59%	30%

3.2. The future of the European Union

After the sharp decline in optimism in autumn 2011, this is the second successive survey to record a slight upturn in expectations about the future of the EU. Half of Europeans (+1 percentage point since spring 2012) say they are optimistic about the future of the EU, while 45% (-1) are pessimistic. The optimism/pessimism ratio now stands at +5, recovering steadily since spring 2012 (+3) and autumn 2011 (+2)⁵⁴.



Optimism about the future of the EU is stronger among respondents within NMS12 countries (58%, +1 percentage point) and countries outside the euro area (51%, -1) than in euro area countries (48%, +1) or the EU15 (47%, +1). Within the euro area, optimism has moved ahead of pessimism in this survey (48% against 47%).

The optimism/pessimism opinion ratio has reversed in this survey in three countries. It has become positive in Spain (48% versus 45% compared with 39% versus 54% in spring 2012) and Austria (48% versus 46% compared with 42% versus 52%). Conversely, it has returned to negativity in France (44% versus 52% compared with 49% versus 47%), after becoming positive in the spring 2012 survey.

Taking account of these evolutions, pessimism is now dominant in eight countries of the European Union: France is joined by Greece (71%), Portugal (64%), Cyprus (59%), Hungary (57%), the United Kingdom (56%), the Czech Republic (56%) and Italy (47% versus 45%). Pessimism has grown significantly in Cyprus (+9) and Greece (+7) but has declined in Hungary (-6) and Italy (-5).

⁵⁴ QA23. Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?

Optimism is therefore dominant in the remaining 19 Member States, with the highest levels in Denmark (72%), Poland (66%), Lithuania (65%) and Bulgaria (64%). Within this group of countries, optimism has gained ground significantly in Bulgaria (+6) Finland (+4) and Ireland (+4); in contrast, it has declined noticeably in Romania (-5), Slovenia (-4) and Slovakia (-4).

As in all previous Eurobarometer surveys, social variables play an important role in determining expectations about the future of the European Union. Firstly, the level of optimism increases with an individual's social position and socio-economic situation: 33% of people who have difficulty paying their bills most of the time and 37% of those at the bottom of the social scale are optimistic about the future of the EU, compared with 55% and 59% respectively of respondents who almost never have difficulty meeting their bills and who position themselves at the top of the social scale. Secondly, it decreases linearly with age: 58% of 15-24 year olds, 51% of 25-39 year olds, 48% of 40-54 year olds and 46% of those aged 55 and over look forward with optimism to the future of the EU.

Lastly, the extent of optimism also varies significantly in accordance with attitudes towards the EU: optimism is more widespread among people who have a good knowledge of the EU (56%), who trust the EU (79%), or who feel that their voice is taken into account in the EU (75%) than among those who have a poor knowledge of the EU (36%), who distrust it (33%), or who believe their voice is not heard in the EU (37%).

ANNEXES

TECHNICAL SPECIFICATIONS

TECHNICAL SPECIFICATIONS

Between the 3rd and the 18th of November, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out the wave 78.1 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Speechwriting".

The wave 78.1 is the STANDARD EUROBAROMETER 78 survey and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over.

The STANDARD EUROBAROMETER 78 survey has also been conducted in the six candidate countries (Croatia, Turkey, the Former Yugoslav Republic of Macedonia, Iceland, Montenegro and Serbia) and in the Turkish Cypriot Community. In these countries, the survey covers the national population of citizens and the population of citizens of all the European Union Member States that are residents in these countries and have a sufficient command of the national languages to answer the questionnaire.

The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process (at the 95% level of confidence)											
various sample sizes are in rows					various observed results are in columns						
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.031	03/11/2012	18/11/2012	8.866.411
BG	Bulgaria	TNS BBSS	1.020	03/11/2012	11/11/2012	6.584.957
CZ	Czech Rep.	TNS Aisa	1.003	03/11/2012	14/11/2012	8.987.535
DK	Denmark	TNS Gallup DK	1.001	03/11/2012	18/11/2012	4.533.420
DE	Germany	TNS Infratest	1.562	03/11/2012	18/11/2012	64.545.601
EE	Estonia	Emor	1.003	03/11/2012	18/11/2012	916.000
IE	Ireland	IMS Millward Brown	1.000	03/11/2012	18/11/2012	3.375.399
EL	Greece	TNS ICAP	1.001	03/11/2012	17/11/2012	8.693.566
ES	Spain	TNS Demoscopia	1.006	03/11/2012	18/11/2012	39.035.867
FR	France	TNS Sofres	1.008	03/11/2012	18/11/2012	47.620.942
IT	Italy	TNS Infratest	1.032	03/11/2012	18/11/2012	51.252.247
CY	Rep. of Cyprus	Synovate	503	03/11/2012	18/11/2012	651.400
LV	Latvia	TNS Latvia	1.011	03/11/2012	18/11/2012	1.448.719
LT	Lithuania	TNS LT	1.019	03/11/2012	18/11/2012	2.849.359
LU	Luxembourg	TNS ILReS	502	03/11/2012	17/11/2012	404.907
HU	Hungary	TNS Hoffmann Kft	1.028	03/11/2012	18/11/2012	8.320.614
MT	Malta	MISCO	500	03/11/2012	18/11/2012	335.476
NL	Netherlands	TNS NIPO	1.016	03/11/2012	18/11/2012	13.288.200
AT	Austria	Österreichisches Gallup-Institut	993	03/11/2012	18/11/2012	6.973.277
PL	Poland	TNS OBOP	1.000	03/11/2012	18/11/2012	32.306.436
PT	Portugal	TNS EUROTESTE	1.015	03/11/2012	18/11/2012	8.080.915
RO	Romania	TNS CSOP	1.014	03/11/2012	13/11/2012	18.246.731
SI	Slovenia	RM PLUS	1.014	03/11/2012	18/11/2012	1.748.308
SK	Slovakia	TNS Slovakia	1.000	03/11/2012	18/11/2012	4.549.954
FI	Finland	TNS Gallup Oy	1.007	03/11/2012	18/11/2012	4.412.321
SE	Sweden	TNS GALLUP	1.029	03/11/2012	18/11/2012	7.723.931
UK	United Kingdom	TNS UK	1.304	03/11/2012	18/11/2012	51.081.866
TOTAL EU27			26.622	03/11/2012	18/11/2012	406.834.359
CY(tcc)	Turkish Cypriot Community	Kadem	500	03/11/2012	18/11/2012	143.226
HR	Croatia	Puls	1.000	03/11/2012	18/11/2012	3.749.400
TR	Turkey	TNS PIAR	1.000	03/11/2012	18/11/2012	52.728.513
MK	Former Yugoslav Rep. of Macedonia	TNS Brima	1.056	03/11/2012	09/11/2012	1.678.404
IS	Iceland	Capacent	502	03/11/2012	18/11/2012	252.277
ME	Montenegro	TNS Medium Gallup	1.017	03/11/2012	15/11/2012	492.265
RS	Serbia	TNS Medium Gallup	1.034	03/11/2012	15/11/2012	6.409.693
TOTAL			32.731	03/11/2012	18/11/2012	472.288.137

QUESTIONNAIRE

A. CORE QUESTIONNAIRE

ASK ALL

QA1 On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?

(ONE ANSWER ONLY)

Very satisfied	1
Fairly satisfied	2
Not very satisfied	3
Not at all satisfied	4
DK	5

EB77.3 QA1

QA2 When you get together with friends or relatives, would you say you discuss frequently, occasionally or never about...?

(ONE ANSWER PER LINE)

	(READ OUT)	Frequently	Occasio- nally	Never	DK
1	(ONLY IN EU27) National political matters	1	2	3	4
2	European political matters	1	2	3	4
3	(ONLY IN EU27) Local political matters	1	2	3	4

EB77.3 QA2

DO NOT ASK QA3a IN CY(tcc) – CY(tcc) GO TO QA3b

QA3a How would you judge the current situation in each of the following?

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Very good	Rather good	Rather bad	Very bad	DK
1	The situation of the (NATIONALITY) economy	1	2	3	4	5
2	The situation of the European economy	1	2	3	4	5
3	The situation of the economy in the world	1	2	3	4	5
4	Your personal job situation	1	2	3	4	5
5	The financial situation of your household	1	2	3	4	5
6	The employment situation in (OUR COUNTRY)	1	2	3	4	5

EB77.3 QA4a

ASK QA3b ONLY IN CY(tcc) – OTHERS GO TO QA4a

QA3b How would you judge the current situation in each of the following?

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Very good	Rather good	Rather bad	Very bad	DK
1	The economic situation in the Turkish Cypriot Community	1	2	3	4	5
2	The situation of the European economy	1	2	3	4	5
3	The situation of the economy in the world	1	2	3	4	5
4	Your personal job situation	1	2	3	4	5
5	The financial situation of your household	1	2	3	4	5
6	The employment situation in the Turkish Cypriot Community	1	2	3	4	5

EB77.3 QA4b

DO NOT ASK QA4a IN CY(tcc) – CY(tcc) GO TO QA4b

QA4a What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

(ONE ANSWER PER LINE)

	(READ OUT)	Better	Worse	Same	DK
1	Your life in general	1	2	3	4
2	The economic situation in (OUR COUNTRY)	1	2	3	4
3	The financial situation of your household	1	2	3	4
4	The employment situation in (OUR COUNTRY)	1	2	3	4
5	Your personal job situation	1	2	3	4
6	The economic situation in the EU	1	2	3	4
7	The economic situation in the world	1	2	3	4

EB77.3 QA5a

ASK QA4b ONLY IN CY(tcc) – OTHERS GO TO QA5a

QA4b What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

(ONE ANSWER PER LINE)

	(READ OUT)	Better	Worse	Same	DK
1	Your life in general	1	2	3	4
2	The economic situation in the Turkish Cypriot Community	1	2	3	4
3	The financial situation of your household	1	2	3	4
4	The employment situation in the Turkish Cypriot Community	1	2	3	4
5	Your personal job situation	1	2	3	4
6	The economic situation in the EU	1	2	3	4
7	The economic situation in the world	1	2	3	4

EB77.3 QA5b

DO NOT ASK QA5a AND QA6a IN CY(tcc) – CY(tcc) GO TO QA5b

QA5a What do you think are the two most important issues facing (OUR COUNTRY) at the moment?

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Housing	7,
Government debt	8,
Immigration	9,
Health and social security	10,
The education system	11,
Pensions	12,
The environment, climate and energy issues	13,
Other (SPONTANEOUS)	14,
None (SPONTANEOUS)	15
DK	16

EB77.3 QA7a

QA6a And personally, what are the two most important issues you are facing at the moment?

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
The economic situation in (OUR COUNTRY)	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Housing	7,
The financial situation of your household	8,
Immigration	9,
Health and social security	10,
The education system	11,
The environment, climate and energy issues	12,
Pensions	13,
Other (SPONTANEOUS)	14,
None (SPONTANEOUS)	15
DK	16

EB77.3 QA8a

ASK QA5b AND QA6b ONLY IN CY(tcc) – OTHERS GO TO QA7

QA5b What do you think are the two most important issues facing our Community at the moment?

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Housing	7,
Cyprus issue	8,
Immigration	9,
Health and social security	10,
The education system	11,
Pensions	12,
The environment, climate and energy issues	13,
Other (SPONTANEOUS)	14,
None (SPONTANEOUS)	15
DK	16

EB77.3 QA7b

QA6b And personally, what are the two most important issues you are facing at the moment?

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
The economic situation in our Community	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Cyprus issue	7,
Housing	8,
The financial situation of your household	9,
Immigration	10,
Health and social security	11,
The education system	12,
The environment, climate and energy issues	13,
Pensions	14,
Other (SPONTANEOUS)	15,
None (SPONTANEOUS)	16
DK	17

EB77.3 QA8b

ASK QA7 ONLY IN EU27 - CY(tcc) GO TO QA8b - OTHERS GO TO QA8a

QA7 What do you think are the two most important issues facing the EU at the moment?

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
EU's influence in the world	7,
The state of Member States public finances	8,
Immigration	9,
Pensions	10,
The environment	11,
Energy supply	12,
Climate change	13,
Other (SPONTANEOUS)	14,
None (SPONTANEOUS)	15
DK	16

EB77.3 QA9

DO NOT ASK QA8a AND QA9a IN EU27 AND IN CY(tcc) – CY(tcc) GO TO QA8b – EU27 GO TO

QA8a Generally speaking, do you think that (OUR COUNTRY)'s membership of the EU would be...?

(READ OUT)

A good thing	1
A bad thing	2
Neither good nor bad	3
DK	4

EB77.3 QA10a

QA9a Taking everything into account, would you say that (OUR COUNTRY) would benefit or not from being a member of the EU?

Would benefit	1
Would not benefit	2
DK	3

EB77.3 QA11a

ASK QA8b AND QA9b ONLY IN CY(tcc) – OTHERS GO TO QA10a

QA8b Generally speaking, do you think that for the Turkish Cypriot Community the full application of EU legislation would be...?

(READ OUT)

A good thing	1
A bad thing	2
Neither good nor bad	3
DK	4

EB77.3 QA10b

QA9b Taking everything into consideration, would you say that the Turkish Cypriot Community would benefit or not from the full application of the EU legislation?

Would benefit	1
Would not benefit	2
DK	3

EB77.3 QA11b

DO NOT ASK QA10a IN CY(tcc) – CY(tcc) GO TO QA10b

QA10a At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...?

(ONE ANSWER PER LINE)

	(READ OUT)	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SPONTANEOUS)	DK
1	(OUR COUNTRY)	1	2	3	4
2	The European Union	1	2	3	4

EB77.3 QA12a TREND MODIFIED

ASK QA10b ONLY IN CY(tcc) – OTHERS GO TO QA11

QA10b At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...?

(ONE ANSWER PER LINE)

	(READ OUT)	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SPONTANEOUS)	DK
1	Our Community	1	2	3	4
2	The European Union	1	2	3	4

EB77.3 QA12b TREND MODIFIED

ASK ALL

QA11 I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it.

(ONE ANSWER PER LINE)

	(READ OUT)	Tend to trust	Tend not to trust	DK
1	The press	1	2	3
2	Radio	1	2	3
3	Television	1	2	3
4	The Internet	1	2	3
5	Political parties	1	2	3
6	(NOT IN CY(tcc)) The (NATIONALITY) Government	1	2	3
7	(NOT IN CY(tcc)) The (NATIONALITY) PARLIAMENT (USE PROPER NAME FOR LOWER HOUSE)	1	2	3
8	The European Union	1	2	3
9	The United Nations	1	2	3
10	Regional or local public authorities	1	2	3

EB77.3 QA13 (items 5-10) + EB76.3 QA10 (items 1-4)

QA12 In general, does the EU conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?

(ONE ANSWER ONLY)

Very positive	1
Fairly positive	2
Neutral	3
Fairly negative	4
Very negative	5
DK	6

EB77.3 QA14

QA13 What does the EU mean to you personally?

(SHOW CARD – READ OUT – ROTATE TOP TO BOTTOM/ BOTTOM TO TOP – MULTIPLE ANSWERS POSSIBLE)

Peace	1,
Economic prosperity	2,
Democracy	3,
Social protection	4,
Freedom to travel, study and work anywhere in the EU	5,
Cultural diversity	6,
Stronger say in the world	7,
Euro	8,
Unemployment	9,
Bureaucracy	10,
Waste of money	11,
Loss of our cultural identity	12,
More crime	13,
Not enough control at external borders	14,
Other (SPONTANEOUS)	15,
DK	16

EB77.3 QA15

ASK QA14 ONLY IN EU27 - OTHERS GO TO QA15

QA14 Please tell me for each of the following words if it describes very well, fairly well, fairly badly or very badly the idea you might have of the EU.

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Describes very well	Describes fairly well	Describes fairly badly	Describes very badly	DK
1	Modern	1	2	3	4	5
2	Democratic	1	2	3	4	5
3	Protective	1	2	3	4	5
4	Efficient (N)	1	2	3	4	5
5	Technocratic	1	2	3	4	5

EB74.2 QA15 TREND MODIFIED

ASK ALL

QA15 Have you heard of...?

(ONE ANSWER PER LINE)

	(READ OUT)	Yes	No	DK
1	The European Parliament	1	2	3
2	The European Commission	1	2	3
3	The Council of the European Union	1	2	3
4	The European Central Bank	1	2	3
5	(ONLY EU27) The Court of Justice of the European Union	1	2	3

EB77.3 QA16

QA16 For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.

(ONE ANSWER PER LINE)

	(READ OUT)	Tend to trust	Tend not to trust	DK
1	The European Parliament	1	2	3
2	The European Commission	1	2	3
3	The Council of the European Union	1	2	3
4	The European Central Bank	1	2	3
5	(ONLY IN EU27) The Court of Justice of the European Union	1	2	3

EB77.3 QA17

QA17 For each of the following statements about the EU could you please tell me whether you think it is true or false.

(ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	True	False	DK
1	The EU currently consists of 27 Member States	1	2	3
2	The members of the European Parliament are directly elected by the citizens of each Member State	1	2	3
3	Switzerland is a member of the EU	1	2	3

EB77.3 QA18

QA18 What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.

(ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	For	Against	DK
1	A European economic and monetary union with one single currency, the euro	1	2	3
2	(ONLY IN EU27) A common foreign policy of the 27 Member States of the EU	1	2	3
3	Further enlargement of the EU to include other countries in future years	1	2	3
4	(ONLY IN EU27) A common defence and security policy among EU Member States	1	2	3
5	(ONLY IN EU27) European political parties to present their candidate for the post of European Commission President at the next European Parliament elections (N)	1	2	3

EB77.3 QA19 TREND MODIFIED

ASK QA19a AND QA19b ONLY IN EU27 – CY(tcc) GO TO QA20b – OTHERS GO TO QA20a

QA19a On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in (OUR COUNTRY)?

QA19b And how about the way democracy works in the EU?

(SHOW CARD WITH SCALE – ONE ANSWER PER COLUMN)

(READ OUT)	QA19a	QA19b
	In (OUR COUNTRY)	In the EU
Very satisfied	1	1
Fairly satisfied	2	2
Not very satisfied	3	3
Not at all satisfied	4	4
DK	5	5

EB77.3 QA20a&b

DO NOT ASK QA20a IN CY(tcc) – CY(tcc) GO TO QA20b

QA20a Please tell me to what extent you agree or disagree with each of the following statements.

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	I understand how the EU works	1	2	3	4	5
2	(ONLY IN EU27) The interests of (OUR COUNTRY) are well taken into account in the EU	1	2	3	4	5
3	(ONLY IN EU27) I feel I am safer because (OUR COUNTRY) is a member of the EU	1	2	3	4	5
4	My voice counts in the EU	1	2	3	4	5
5	My voice counts in (OUR COUNTRY)	1	2	3	4	5
6	The EU's voice counts in the world	1	2	3	4	5
7	Globalisation is an opportunity for economic growth	1	2	3	4	5
8	(OUR COUNTRY) alone can cope with the negative effects of globalisation (N)	1	2	3	4	5
9	(ONLY IN EU27) (ONLY TO SPLIT A) The EU helps to protect European citizens from the negative effects of globalisation	1	2	3	4	5
10	(ONLY IN EU27) (ONLY TO SPLIT B) The EU enables European citizens to better benefit from the positive effects of globalisation	1	2	3	4	5
11	(ONLY IN EU 27) (OUR COUNTRY) could better face the future outside the EU (N)	1	2	3	4	5
12	(ONLY IN EU 27) The EU should develop further into a federation of Nation-States (N)	1	2	3	4	5

EB77.3 QA21a TREND MODIFIED

ASK QA20b ONLY IN CY(tcc) – OTHERS GO TO QA21a

QA20b Please tell me to what extent you agree or disagree with each of the following statements.

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	I understand how the EU works	1	2	3	4	5
2	My voice counts in the EU	1	2	3	4	5
3	My voice counts in our Community	1	2	3	4	5
4	The EU's voice counts in the world	1	2	3	4	5
5	Globalisation is an opportunity for economic growth	1	2	3	4	5
6	Our Community alone can cope with the negative effects of globalisation (N)	1	2	3	4	5

EB77.3 QA21b TREND MODIFIED

ASK QA21 TO QA23 ONLY IN EU27 - OTHERS GO TO QC1

QA21 In your opinion, at the current time, what is the main objective of the building of Europe?

QA22 And what should be the main objective of the building of Europe?

(SHOW CARD – ONE ANSWER PER COLUMN)

(READ OUT - ROTATE)	QA21	QA22
	CURRENT	SHOULD BE
To develop the EU's economy and boost growth	1	1
To make the EU a major diplomatic actor on the international stage	2	2
To improve the standard of living of all EU citizens	3	3
To combat global threats (terrorism, climate change)	4	4
To promote the development of the poorest countries outside the EU	5	5
To promote democracy and human rights in the world	6	6
Maintain peace and stability	7	7
To protect European citizens against the negative effects of globalisation (relocation of industries and jobs, competition from emerging countries for European businesses)	8	8
Other (SPONTANEOUS)	9	9
DK	10	10

EB77.3 QA25a&b

QA23 Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?

(ONE ANSWER ONLY)

Very optimistic	1
Fairly optimistic	2
Fairly pessimistic	3
Very pessimistic	4
DK	5

EB77.3 QA26